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**Ballaro et al.**

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(54) **METHOD, MEDIUM, AND SYSTEM FOR PURCHASE REQUISITION IMPORTATION**

(75) Inventors: **Charles A. Ballaro**, Apex, NC (US);  
**Phillip J. Sabino**, Raleigh, NC (US)

(73) Assignee: **SCIQUEST INC.**, Cary, NC (US)

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**Related U.S. Application Data**

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(51) **Int. Cl.**  
**G06Q 30/00** (2012.01)  
**G06Q 30/06** (2012.01)

(52) **U.S. Cl.**  
CPC ..... **G06Q 30/0635** (2013.01)

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CPC ..... G06Q 30/0601; G06Q 30/0635; G06Q 30/0637; G06Q 30/0611; G06Q 30/087  
USPC ..... 705/26.81, 26.82, 26.4, 26.1, 26.3  
See application file for complete search history.

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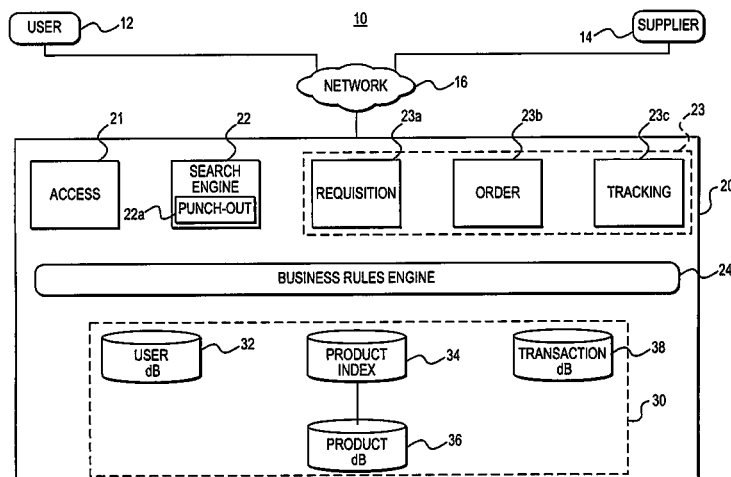
*Primary Examiner* — Matthew Zimmerman

(74) *Attorney, Agent, or Firm* — Morgan, Lewis & Bockius LLP

(57) **ABSTRACT**

In an embodiment, a computer-implemented method operating at a server system is disclosed. The server hosts and electronic procurement system. One or more user instructions for importing a purchase requisition are received. In response to the one or more instructions, a purchase requisition is received, where the purchase requisition originates from outside the electronic procurement system. The purchase requisition is converted from a first format to a second format, wherein the second format is native to the electronic procurement system. The converted purchase requisition verified to be consistent with business rules associated with the electronic procurement system, including at least a rule to verify that the purchase requisition originates from a recognized user of the electronic procurement system. Then, the purchaser requisition is routed for approval. Related methods and systems are also disclosed.

**27 Claims, 164 Drawing Sheets**



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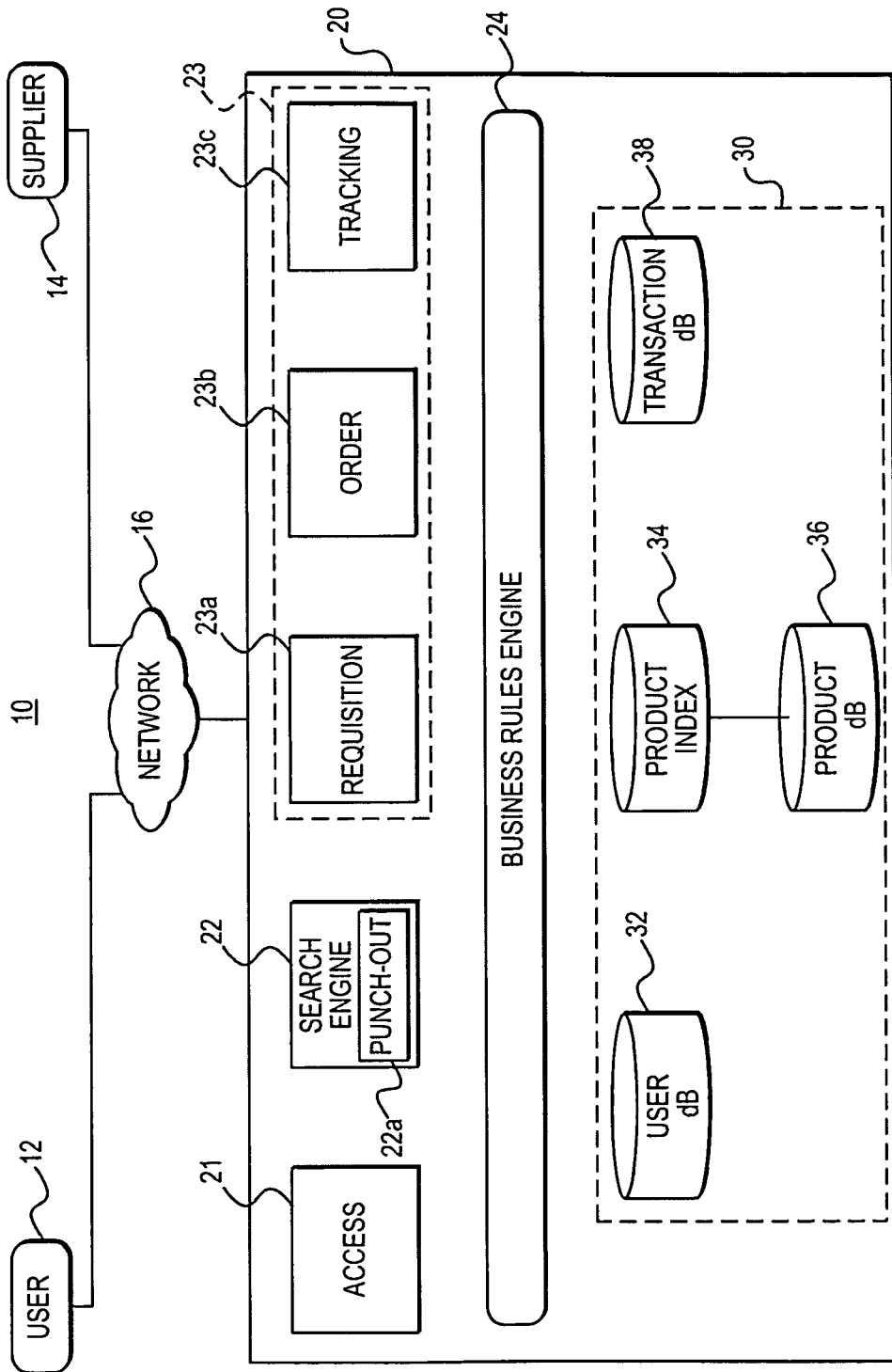
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**FIG. 1**

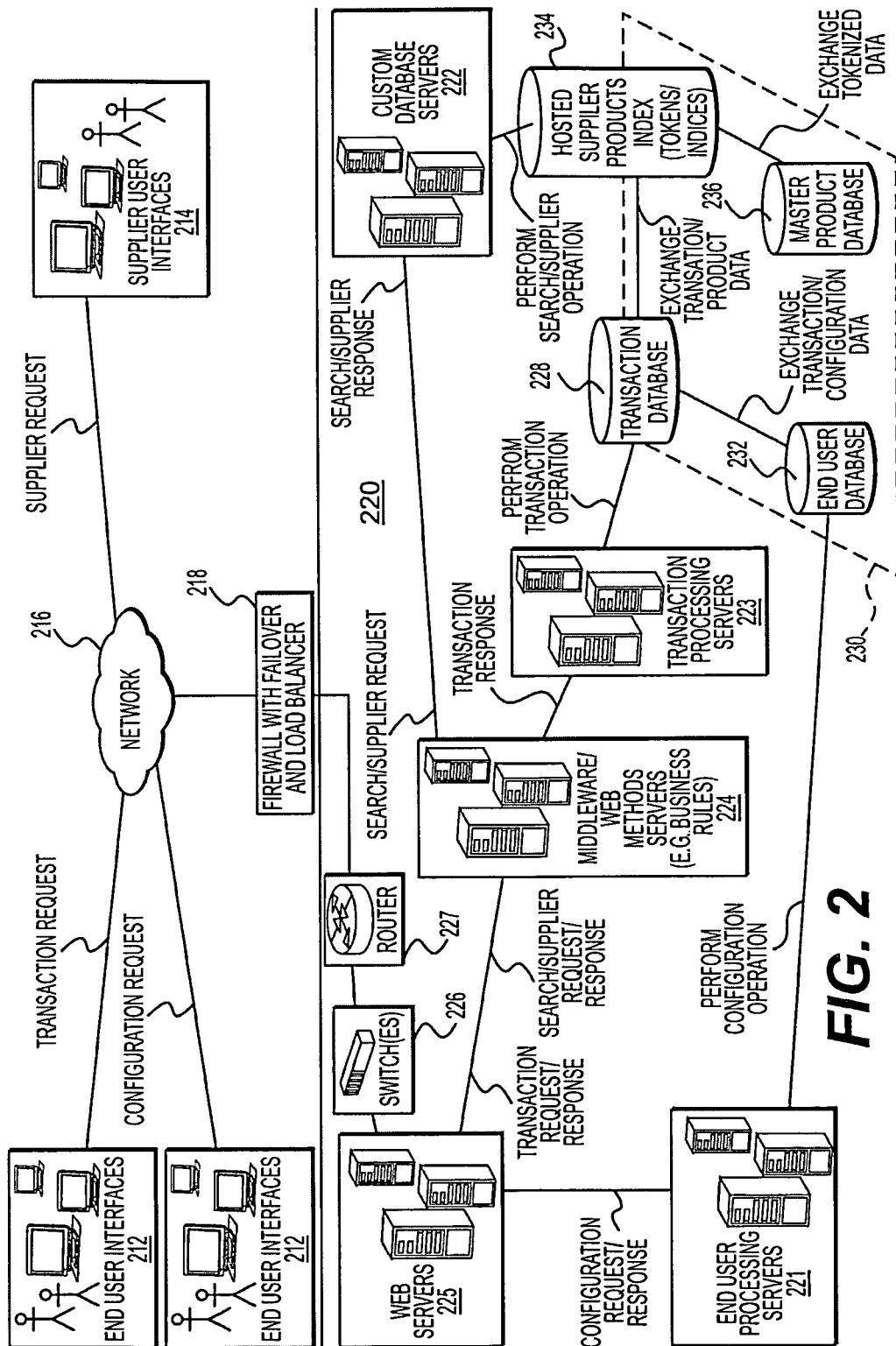


FIG. 2

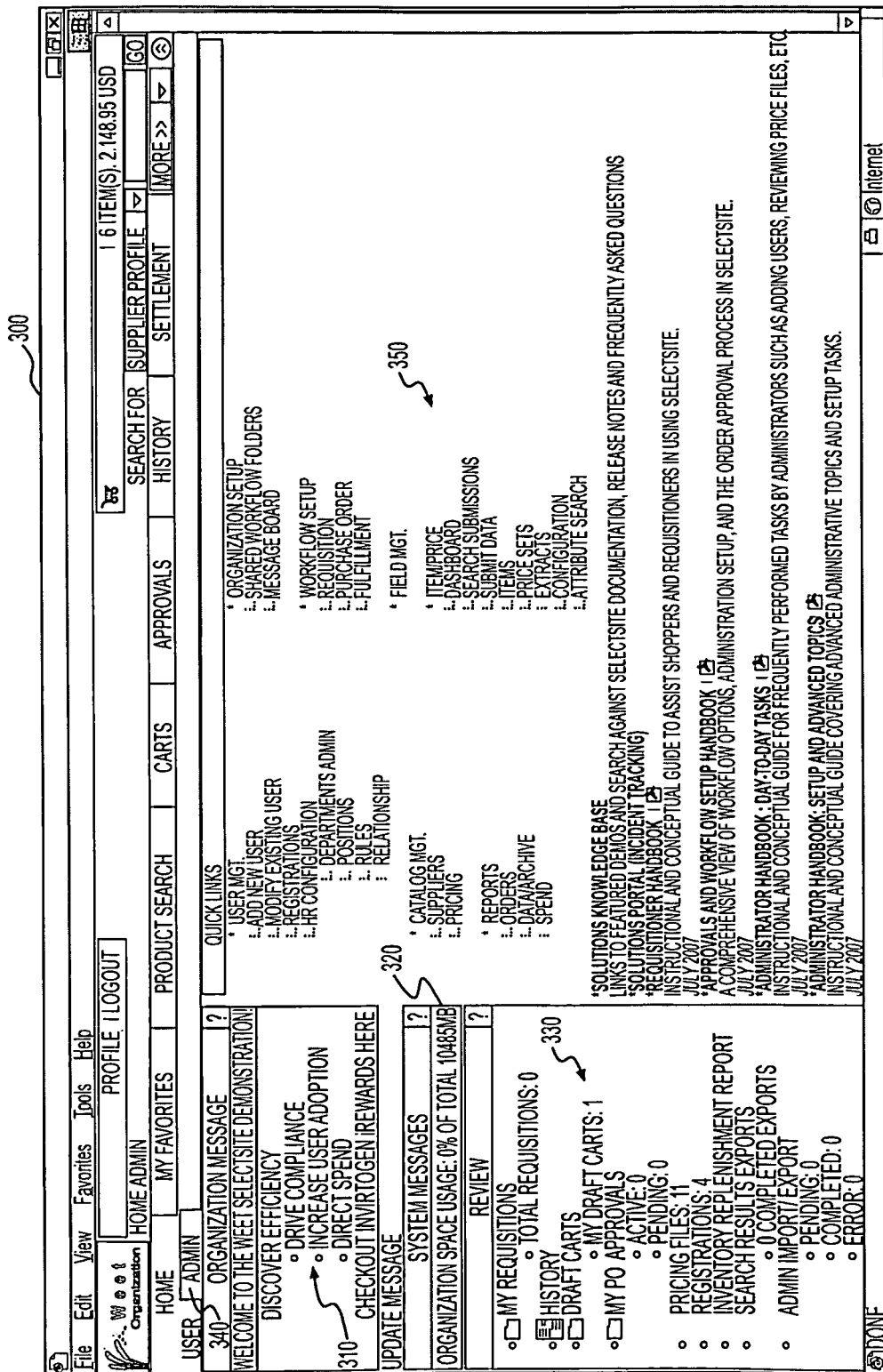



FIG. 3

442



PROFILE/LOGOUT

USER MANAGEMENT - HR CONFIGURATION

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

440

442

430

APPLY ALL CHANGES

CLICK ON A DEPARTMENT NAME BELOW TO MODIFY IT, OR CLICK "CREATE NEW DEPARTMENT" TO CREATE A NEW ONE.

NOTE: ONCE YOU CLICK "CREATE NEW DEPARTMENT" YOU CANNOT DELETE THE NEW DEPARTMENT, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN

POSITIONS

ROLES

RELATIONSHIP

444

446

448

DEPARTMENTS

CSV WORKFLOW RULE IMPORT/EXPORT

444

CREATE NEW DEPARTMENT

SELECT A DEPARTMENT TO EDIT

DEPARTMENTS

ENGINEERING

IT

LEGAL

MATH

MICROBIOLOGY

PRODUCT MANAGEMENT

PURCHASING

TECH PUBS DEPT

TRAINING

442b

EDIT SELECTED DEPARTMENT

NAME

ENGINEERING

442a

ACTIVE

SAVE DEPARTMENT

442c

TO APPLY THE SAVED DEPARTMENT CHANGES

442d

REQUISITION

PO

FULFILLMENT

442e

SETUP AND MODIFY DYNAMIC WORKFLOW RULES. IMPORTED RULES CAN BE VIEWED AND MODIFIED. FOR MORE DETAILS, CLICK HERE.

ADD RULE

EXPORT RULES

DELETE SELECTED APPROVERS

EDIT RULE

REMOVE RULE


RULE - RANGE (5,000.00 - \*) USD

APPROOVER

(... ADD MORE APPROVERS)

400

FIG. 4A



PROFILE | LOGOUT

16 ITEM(S)

GO

SEARCH FOR SUPPLIER PROFILE

USER MGT

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

440

CLICK ON A POSITION NAME BELOW TO MODIFY IT, OR CLICK "CREATE NEW POSITION" TO CREATE A NEW POSITION.  
NOTE: ONCE YOU CLICK "CREATE NEW POSITION" YOU CANNOT DELETE THE NEW POSITION, ONLY INACTIVATE IT.

APPLY ALL CHANGES

444

CREATE NEW POSITION

SELECT A POSITION TO EDIT

POSITIONS

BUYER

DOCUMENTATION EDITOR

PROFESSOR

RESEARCHER

TECHNICAL WRITER

DEPARTMENTS ADMIN

POSITIONS

ROLES

RELATIONSHIP

EDIT SELECTED POSITION

NAME

ACTIVE

PROFESSOR

APPLY POSITION

SELECT ALL

ENGINEERING

IT

LEGAL

MATH

MICROBIOLOGY

PRODUCT MANAGEMENT

PURCHASING

TECH PUBS DEPT

TRAINING


DESELECT ALL

DEPARTMENT NAME

SAVE POSITION

TO APPLY THE SAVED POSITION CHANGES

FIG. 4B



W O O t

Organization

PROFILE LOGOUT

USER MANAGEMENT - HR CONFIGURATION

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT

?

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

?

APPLY ALL CHANGES

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE"

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN

POSITIONS

ROLES

RELATIONSHIP

?

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

ROLES

+ ADMINISTRATOR

+ APPROVER

+ CATALOG MANAGER

+ CHEMICAL MANAGEMENT ONLY

+ JUNIOR EDITOR

+ LBM ADMINISTRATOR

+ LEGAL

+ RECEIVING

+ REQUISITIONER

+ RESEARCHER - DO NOT TOUCH

+ SENIOR EDITOR

+ SENIOR TECHNICAL WRITER

+ SUPPLIER

400

FIG. 4C

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

16 ITEM(S)

GO

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

?

APPLY ALL CHANGES

440

CLICK ON A DEPARTMENT NAME BELOW TO MANAGE ITS POSITIONS' ROLES. A POSITION MAY HAVE NO ROLES ASSOCIATED WITH IT.

ASSIGN POSITIONS TO DEPARTMENTS UNDER THE POSITIONS TAB.

ASSIGN PERMISSIONS TO ROLES UNDER THE ROLES TAB.

DEPARTMENT'S ADMIN

POSITIONS

ROLES

RELATIONSHIP

448

SELECT A DEPARTMENT

ENGINEERING

IT

LEGAL

MATH

MIRCROBIOLOGY

PRODUCT MANAGEMENT

PURCHASING

TECH PUBS DEPT

TRAINING

POSITIONS OF DEPARTMENT

PROFESSOR

RESEARCHER

SELECTED ROLES

APPROVER

REQUISITIONER

REQUISITIONER

MOVE

◀

▶

◀

▶

AVAILABLE ROLES

ACCOUNTING

ADMINISTRATOR

APPROVER

CATALOG MANAGER

CHEMICAL MANAGEMENT ONLY

FINANCIAL SEARCHVIEW

JUNIOR ADMIN

JUNIOR ADMIN 2

JUNIOR EDITOR

LBM ADMINISTRATOR

LCM ADMIN

LEGAL

CTRL + SHIFT TO SELECT MULTIPLE

SAVE RELATIONSHIP

400

FIG. 4D

PROFILE | LOGOUT

USER MANAGEMENT - USER SEARCH

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT

GO

6 ITEM(S)

SEARCH FOR [SUPPLIER PROFILE]

?

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

410

420

430

440

CREATE USER

410a

?

STATUS

FIRST NAME

LAST NAME

USER NAME

EMAIL

DEPARTMENT

POSITION

ROLE

SEARCH

410b

VIEW SUBMITTED REQUESTS...

400

FIG. 4E



W E T  
Organization

HOME

MY FAVORITES

REGISTRATIONS

PROFILE LOGOUT

USER MANAGEMENT - PENDING USERS

PRODUCT SEARCH

USER IMPORT

CARTS

HR CONFIGURATION I

APPROVALS

USER MGT

HISTORY

SETTLEMENT

SEARCH FOR SUPPLIER PROFILE

16 ITEM(S)

GO

?

CREATE USER

420

PENDING REGISTRATION(S): 4

<PAGE 1 OF 1>

NAME	USER NAME	PHONE	EMAIL	DEPARTMENT	POSITION	APPROVAL
FIRST USER	FUSER	(000) 000-0000	FUSER@COMPANY.COM		--	APPROVE
SECOND USER	SEUSER	(000) 000-0001	SEUSER@COMPANY.COM		--	APPROVE
THIRD USER	TUSER	(000) 000-0002	TUSER@COMPANY.COM		--	APPROVE
FOURTH USER	FOUSER	(000) 000-0003	FOUSER@COMPANY.COM		--	APPROVE

400

FIG. 4F

PROFILE/LOGOUT

16 ITEM(S)

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR SUPPLIER PROFILE

GO

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

440

APPLY ALL CHANGES

?

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE"

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN

POSITIONS

ROLES

RELATIONSHIP

446

?

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

ROLES

ADMINISTRATOR

+ JR ADMIN

LCM ADMIN 3

LCM ADMIN

APPROVER

CATALOG MANAGER

CHEMICAL MANAGEMENT ONLY

+ JUNIOR EDITOR

LCM ADMINISTRATOR

LEGAL

RECEIVING

+ REQUISITIONER

RESEARCHER - DO NOT TOUCH

SENIOR EDITOR

+ SENIOR TECHNICAL WRITER

SUPPLIER

SELECTED ROLE: ADMINISTRATOR

ROLE PROPERTIES

NAME

ACTIVE

DEFAULT ROLE

CURRENT DEFAULT ROLE

446a

PURCHASING

446b

PERMISSIONS

446c

MATERIALS MGT

446d

HISTORY

446e

ADMINISTRATOR

☒

☐

REQUISITIONER

SAVE ROLE

400

FIG. 4G

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR

SUPPLIER PROFILE

6 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

440

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

ROLES

-ADMINISTRATOR

+JR ADMIN

+JR ADMIN 3

+LCM ADMIN

+APPROVER

+CATALOG MANAGER

+CHEMICAL MANAGEMENT ONLY

+JUNIOR EDITOR

+LBM ADMINISTRATOR

+LEGAL

+RECEIVING

+REQUISITIONER

+RESEARCHER - DO NOT TOUCH

+SENIOR EDITOR

+SENIOR TECHNICAL WRITER

+SUPPLIER

SELECTED ROLE: ADMINISTRATOR

446b

ROLE PROPERTIES | PURCHASING | PERMISSIONS | MATERIALS MGT | HISTORY

CUSTOM FIELDS | PURCHASING/APPROVAL LIMITS | PRODUCT VIEWS | PUNCHOUT ACCESS

HEADER (INT.) | HEADER (EXT.) | CODES | INTERNAL INFORMATION

CUSTOM FIELD NAME

PRWF

DEFAULT VALUE

DESCRIPTION

NO DEFAULT VALUE


EDIT VALUES

EDIT

APPLY ALL CHANGES

6 ITEM(S)

FIG. 4H



PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR  SUPPLIER PROFILE

6 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS **ROLES** RELATIONSHIP

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

SELECTED ROLE: ADMINISTRATOR

ROLES

-ADMINISTRATOR

+ JR ADMIN

+ JR ADMIN 3

+ LCM ADMIN

+ APPROVER

+ CATALOG MANAGER

+ CHEMICAL MANAGEMENT ONLY

+ JUNIOR EDITOR

+ LBM ADMINISTRATOR

+ LEGAL

+ RECEIVING

+ REQUISITIONER

+ RESEARCHER - DO NOT TOUCH

+ SENIOR EDITOR

+ SENIOR TECHNICAL WRITER

+ SUPPLIER

ROLE PROPERTIES | PURCHASING | PERMISSIONS | MATERIALS MGT | HISTORY

CUSTOM FIELDS | PURCHASING/APPROVAL LIMITS | PRODUCT VIEWS | PUNCHOUT ACCESS

446b

REQUISITION LIMIT

REQUISITION LINE ITEM LIMIT

REQUISITION APPROVAL LIMIT

PURCHASE ORDER LIMIT

PURCHASE ORDER LINE ITEM LIMIT

PURCHASE ORDER APPROVAL LIMIT

PURCHASE ORDER LINE ITEM APPROVAL LIMIT

LIMITED PURCHASE ORDER LIMIT

LINE ITEM LIMITED PURCHASE ORDER LIMIT

VALUE

OVERIDE

ROLE

SAVE

FIG. 41

PROFILE | LOGOUT  
 USER MANAGEMENT - HR CONFIGURATION

6 ITEM(S)

SEARCH FOR

SUPPLIER PROFILE

▼

HOME

|

MY FAVORITES

|

PRODUCT SEARCH

|

CARTS

|

APPROVALS

|

HISTORY

|

SETTLEMENT

|

USER MGT.

▼

USERS

|

REGISTRATIONS

|

USER IMPORT

|

HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN

POSITIONS

ROLES

RELATIONSHIP

**ADD CHILD ROLE**

SELECT A ROLE TO EDIT  
OR CREATE NEW ROLES

**ROLES**

- ADMINISTRATOR
- + JR ADMIN
- + JR ADMIN 3
- + LCM ADMIN
- + APPROVER
- + CATALOG MANAGER
- + CHEMICAL MANAGEMENT ONLY
- + JUNIOR EDITOR
- + LBM ADMINISTRATOR
- + LEGAL
- + RECEIVING
- + REQUISITIONER
- + RESEARCHER - DO NOT TOUCH
- + SENIOR EDITOR
- + SENIOR TECHNICAL WRITER
- + SUPPLIER

**SELECTED ROLE: ADMINISTRATOR**

446b

**ROLE PROPERTIES** | **PURCHASING** | **PERMISSIONS** | **MATERIALS MGT** | **HISTORY**

**CUSTOM FIELDS** | **PURCHASING/APPROVAL LIMITS** | **PRODUCT VIEWS** | **PUNCHOUT ACCESS**

PRODUCT VIEW	AVAILABLE	OVERRIDE
ALL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ERM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
ERM ALT VIEW	<input checked="" type="checkbox"/>	<input type="checkbox"/>
INVITROGEN STOCKROOM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NO ACCESS TO DEMO STOCKROOM	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NO RAD RULES	<input checked="" type="checkbox"/>	<input type="checkbox"/>
NON SCIENTIFIC	<input checked="" type="checkbox"/>	<input type="checkbox"/>
QIAGEN VMI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
RADS ONLY	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SIGMA-ALDRICH VMI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TESTPRICE	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**UPDATE**

**FIG. 4J**

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE. ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

ROLES

-ADMINISTRATOR

+JR ADMIN

+JR ADMIN 3

+LCM ADMIN

+APPROVER

+CATALOG MANAGER

+CHEMICAL MANAGEMENT ONLY

+JUNIOR EDITOR

+LBM ADMINISTRATOR

+LEGAL

+RECEIVING

+REQUISITIONER

+RESEARCHER - DO NOT TOUCH

+SENIOR EDITOR

+SENIOR TECHNICAL WRITER

+SUPPLIER

SELECTED ROLE: ADMINISTRATOR 446b

ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

CUSTOM FIELDS PURCHASING/APPROVAL LIMITS PRODUCT VIEWS PUNCHOUT ACCESS

SUPPLIER	MRO/FACILITIES	AVAILABLE	ROLE	AVAILABLE	ROLE
GRAINGER, INC.		x	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OM WORKSPACE
AMAZON.COM	BOOKS	x	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ONE WORKPLACE
APPLIED BIOSYSTEMS	LAB SUPPLIES	x	<input type="checkbox"/>	<input checked="" type="checkbox"/>	STEELCASE OFFICE FURNITURE
FISHER SCIENTIFIC		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OFFICE/COMPUTER
INVITROGEN		x	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CANNON IV, INC.
KRACKELER SCIENTIFIC, INC.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CDW
SCIQUEST, INC.		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CORPORATE EXPRESS
SIGMA-ALDRICH		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	DELL
VINIMAYA		x	<input type="checkbox"/>	<input checked="" type="checkbox"/>	HEWLETT-PACKARD COMPANY
VWR INTERNATIONAL		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	INSIGHT
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	OFFICE DEPOT
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	STAPLES
			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	SUN MICROSYSTEMS

FIG. 4K

	PROFILE   LOGOUT <b>USER MANAGEMENT - HR CONFIGURATION</b>	6 ITEM(S)																																																																																																											
HOME   MY FAVORITES   PRODUCT SEARCH   CARTS   APPROVALS   HISTORY   SETTLEMENT   USER MGT.																																																																																																													
USERS   REGISTRATIONS   USER IMPORT   HR CONFIGURATION																																																																																																													
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DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP																																																																																																													
?																																																																																																													
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <b>ADD CHILD ROLE</b>          SELECT A ROLE TO EDIT OR CREATE NEW ROLES       </div> <ul style="list-style-type: none"> <li>-ADMINISTRATOR</li> <li>+ JR ADMIN</li> <li>+ JR ADMIN 3</li> <li>+ LCM ADMIN</li> <li>+ APPROVER</li> <li>+ CATALOG MANAGER</li> <li>+ CHEMICAL MANAGEMENT ONLY</li> <li>+ JUNIOR EDITOR</li> <li>+ LBM ADMINISTRATOR</li> <li>+ LEGAL</li> <li>+ RECEIVING</li> <li>+ REQUISITIONER</li> <li>+ RESEARCHER - DO NOT TOUCH</li> <li>+ SENIOR EDITOR</li> <li>+ SENIOR TECHNICAL WRITER</li> <li>+ SUPPLIER</li> </ul>	SELECTED ROLE: ADMINISTRATOR	?																																																																																																											
446c																																																																																																													
ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY																																																																																																													
CUSTOM FIELDS   PURCHASING   APPROVAL LIMITS   PRODUCT VIEWS   PUNCHOUT ACCESS																																																																																																													
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>PERMISSION</th> <th>VALUE</th> <th>OVERRIDE PERMISSION</th> </tr> </thead> <tbody> <tr> <td>HOSTED CATALOG SEARCH</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>PUNCHOUT</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>VENDOR USE FORMS (INCLUDING NON-CATALOG FORM)</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>NON-CATALOG CONFIGURATION</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>BYPASS NON-CATALOG SEARCH</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>MODIFY ORDER DISTRIBUTION</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>INFORMATION ON FORMS &amp; POS</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>CREATE FREE-FORM SUPPLIER ON FORM TEMPLATES</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>CREATE NEW FORM TEMPLATE</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>MY FAVORITES</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>VIEW ORGANIZATION FAVORITES/FORMS</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>EDIT ORGANIZATION FAVORITES</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>VIEW PRODUCT COMPARE</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>CHEMICAL RESOURCE</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> <tr> <td>ANTIBODY RESOURCE</td> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>	PERMISSION	VALUE	OVERRIDE PERMISSION	HOSTED CATALOG SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PUNCHOUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>	VENDOR USE FORMS (INCLUDING NON-CATALOG FORM)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	NON-CATALOG CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	BYPASS NON-CATALOG SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MODIFY ORDER DISTRIBUTION	<input type="checkbox"/>	<input checked="" type="checkbox"/>	INFORMATION ON FORMS & POS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CREATE FREE-FORM SUPPLIER ON FORM TEMPLATES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CREATE NEW FORM TEMPLATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MY FAVORITES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	VIEW ORGANIZATION FAVORITES/FORMS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	EDIT ORGANIZATION FAVORITES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	VIEW PRODUCT COMPARE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CHEMICAL RESOURCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ANTIBODY RESOURCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<table border="1" style="width: 100%; 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HOSTED CATALOG SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
PUNCHOUT	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
VENDOR USE FORMS (INCLUDING NON-CATALOG FORM)	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
NON-CATALOG CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
BYPASS NON-CATALOG SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
MODIFY ORDER DISTRIBUTION	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
INFORMATION ON FORMS & POS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
CREATE FREE-FORM SUPPLIER ON FORM TEMPLATES	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
CREATE NEW FORM TEMPLATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
MY FAVORITES	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
VIEW ORGANIZATION FAVORITES/FORMS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
EDIT ORGANIZATION FAVORITES	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
VIEW PRODUCT COMPARE	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
CHEMICAL RESOURCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
ANTIBODY RESOURCE	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
PERMISSION	VALUE	OVERRIDE PERMISSION																																																																																																											
SHOPPING																																																																																																													
CART/REQUISITION	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
PREPARE REQ FOR ANOTHER USER	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
DO NOT PERMIT PLACE ORDER	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
ASSIGN CART TO ANOTHER USER	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
EDIT USER'S CART ASSIGNEES	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
EDIT PO NUMBER	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
EDIT CREDIT CARD	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
MANUALLY OVERRIDE PRICING	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
SELECT CREDIT CARD FROM PROFILE	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
VIEW SENSITIVE CREDIT CARD DETAILS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
HEADER-LEVEL INTERNAL ATTACHMENTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
LINE-LEVEL INTERNAL ATTACHMENTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
LINE-LEVEL EXTERNAL ATTACHMENTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
ALLOW EDITING OF TAX, SHIPPING, AND HANDLING	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
BYPASS REVIEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
VIEW LINE ITEM HISTORY	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
WITHDRAW PR	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
MODIFY PO CLAUSES IN PRPO	<input type="checkbox"/>	<input checked="" type="checkbox"/>																																																																																																											
<div style="float: left; width: 33%;">           ADD CHILD ROLE         </div> <div style="float: right; width: 33%;">             UPDATE           </div>																																																																																																													

**FIG. 4L**

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

6 ITEM(S)

SEARCH FOR

SUPPLIER PROFILE

▼

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.

③

?

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE. ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

446c

SELECTED ROLE: ADMINISTRATOR

ROLES

-ADMINISTRATOR

+JR ADMIN

+JR ADMIN.3

+LCM ADMIN

+APPROVER

+CATALOG MANAGER

+CHEMICAL MANAGEMENT ONLY

+JUNIOR EDITOR

+LBM ADMINISTRATOR

+LEGAL

+RECEIVING

+REQUISITIONER

+RESEARCHER - DO NOT TOUCH

+SENIOR EDITOR

+SENIOR TECHNICAL WRITER

+SUPPLIER

ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

SHOPPING/CART ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS PERMISSIONS ?

PERMISSION VALUE OVERRIDE PERMISSION

VIEW MY ORDERS

MY ORDERS/ORGANIZATION ORDERS

VIEW ORGANIZATION ORDERS

EDIT ORGANIZATION ORDERS

REVISE PO

CLOSE PURCHASE ORDERS

OPEN PURCHASE ORDERS

RESEND PO TO SUPPLIER

EXPORT SEARCH RESULTS

MANAGE COMPANY EXPORTS

MANAGE ORDER FAILURE

NOTIFICATIONS

PERMISSION VALUE OVERRIDE PERMISSION

FORWARD FULFILLMENT

PURCHASE ORDERS

FULFILL ORDERS


DELEGATE FULFILLMENT PURCHASE

ORDERS TO ANOTHER APPROVER

UPDATE

FIG. 4M




**Organization**

PROFILE | LOGOUT  
 USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR  6 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

?

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE".  
 NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS **ROLES** RELATIONSHIP

**ADD CHILD ROLE**

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

SELECTED ROLE: ADMINISTRATOR

446c


ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

SHOPPING/CART ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS PERMISSIONS ?

PERMISSION	VALUE	PERMISSION	VALUE	PERMISSION	VALUE	PERMISSION	VALUE
EDIT PENDING REQUISITIONS	<input type="checkbox"/>	REQUISITION APPROVALS	<input type="checkbox"/>	EDIT PENDING PURCHASE ORDERS	<input type="checkbox"/>	PURCHASE ORDER APPROVALS	<input type="checkbox"/>
APPROVE/REJECT REQUISITIONS	<input type="checkbox"/>	APPROVE/REJECT PURCHASE ORDERS	<input type="checkbox"/>	APPROVE/REJECT PURCHASE ORDERS	<input type="checkbox"/>	APPROVE/REJECT PURCHASE ORDERS	<input type="checkbox"/>
FORWARD REQUISITIONS	<input type="checkbox"/>	FORWARD PURCHASE ORDERS	<input type="checkbox"/>	FORWARD PURCHASE ORDERS	<input type="checkbox"/>	FORWARD PURCHASE ORDERS	<input type="checkbox"/>
ORDER CONSOLIDATION	<input type="checkbox"/>	PUT PURCHASE ORDERS ON HOLD	<input type="checkbox"/>	PUT PURCHASE ORDERS ON HOLD	<input type="checkbox"/>	PUT PURCHASE ORDERS ON HOLD	<input type="checkbox"/>
PUT REQUISITIONS ON HOLD	<input type="checkbox"/>	EXPEDITE PURCHASE ORDERS	<input type="checkbox"/>	EXPEDITE PURCHASE ORDERS	<input type="checkbox"/>	EXPEDITE PURCHASE ORDERS	<input type="checkbox"/>
EXPEDITE REQUISITIONS	<input type="checkbox"/>	DELEGATE PURCHASE ORDERS TO ANOTHER APPROVER	<input type="checkbox"/>	DELEGATE PURCHASE ORDERS TO ANOTHER APPROVER	<input type="checkbox"/>	DELEGATE PURCHASE ORDERS TO ANOTHER APPROVER	<input type="checkbox"/>
DELEGATE REQUISITIONS TO ANOTHER APPROVER	<input type="checkbox"/>	ADD LINES TO PENDING PURCHASE ORDERS	<input type="checkbox"/>	ADD LINES TO PENDING PURCHASE ORDERS	<input type="checkbox"/>	ADD LINES TO PENDING PURCHASE ORDERS	<input type="checkbox"/>
ADD PRODUCTS TO CONSOLIDATED CART	<input type="checkbox"/>	PURCHASE ORDERS	<input type="checkbox"/>	PURCHASE ORDERS	<input type="checkbox"/>	PURCHASE ORDERS	<input type="checkbox"/>
ADD LINES TO PENDING REQUISITIONS	<input type="checkbox"/>	RESTART/SKIP PURCHASE ORDERS	<input type="checkbox"/>	RESTART/SKIP PURCHASE ORDERS	<input type="checkbox"/>	RESTART/SKIP PURCHASE ORDERS	<input type="checkbox"/>
RESTART/SKIP REQUISITION	<input type="checkbox"/>	WORKFLOW STEPS IN ERROR	<input type="checkbox"/>	WORKFLOW STEPS IN ERROR	<input type="checkbox"/>	WORKFLOW STEPS IN ERROR	<input type="checkbox"/>

UPDATE

FIG. 4N



W & A  
Organization

PROFILE | LOGOUT

6 ITEM(S)

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR [SUPPLIER PROFILE] [v]

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT. [v]

Ⓢ ?

APPLY ALL CHANGES

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: "ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

SELECTED ROLE: ADMINISTRATOR

446c

ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

SHOPPING/CART ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS PERMISSIONS ?

PERMISSION	VALUE	PERMISSION	VALUE	PERMISSION	VALUE	PERMISSION	VALUE
VIEW BUDGET DETAILS	<input type="checkbox"/>	BUDGET	<input type="checkbox"/>	CREATE/VIEW RECEIPTS	<input type="checkbox"/>	SETTLEMENT MANAGER	<input type="checkbox"/>
CREATE/EDIT BUDGET DETAILS	<input type="checkbox"/>		<input type="checkbox"/>	ENABLE BLIND RECEIVING - (HIDE ORDER QUANTITY DURING RECEIVING)	<input type="checkbox"/>		<input type="checkbox"/>
				VIEW INVOICES	<input type="checkbox"/>		<input type="checkbox"/>
				CREATE/EDIT INVOICES	<input type="checkbox"/>		<input type="checkbox"/>
				SET INVOICE AS PAYABLE	<input type="checkbox"/>		<input type="checkbox"/>
				SET INVOICE AS PAID	<input type="checkbox"/>		<input type="checkbox"/>
				MATCH DOCUMENTS WITHIN TOLERANCES	<input type="checkbox"/>		<input type="checkbox"/>
				FORCE MATCH DOCUMENTS	<input type="checkbox"/>		<input type="checkbox"/>
				UNMATCH DOCUMENTS	<input type="checkbox"/>		<input type="checkbox"/>
				RESEND INVOICES TO EXTERNAL SYSTEM	<input type="checkbox"/>		<input type="checkbox"/>

ROLES

ADMINISTRATOR

JR ADMIN

JR ADMIN 3

LCM ADMIN

APPROVER

CATALOG MANAGER

CHEMICAL MANAGEMENT ONLY

JUNIOR EDITOR

LBM ADMINISTRATOR

LEGAL

RECEIVING

REQUISITIONER

RESEARCHER - DO NOT TOUCH


SENIOR EDITOR

SENIOR TECHNICAL WRITER

SUPPLIER

UPDATE

**FIG. 40**

	PROFILE   LOGOUT USER MANAGEMENT - HR CONFIGURATION	SEARCH FOR <span style="border: 1px solid black; padding: 2px;">SUPPLIER PROFILE</span> <span style="float: right;">▼</span>  SEARCH FOR <span style="border: 1px solid black; padding: 2px;">USER MGT.</span> <span style="float: right;">▼</span>	6 ITEM(S)																																																																																																																							
<p>HOME   MY FAVORITES   PRODUCT SEARCH   CARTS   APPROVALS   HISTORY   SETTLEMENT   ?</p> <p>USERS   REGISTRATIONS   USER IMPORT   HR CONFIGURATION</p> <p>CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."</p> <p>NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.</p> <p>DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP</p>																																																																																																																										
<span style="border: 1px solid black; padding: 2px;">ADD CHILD ROLE</span>																																																																																																																										
<p>SELECT A ROLE TO EDIT OR CREATE NEW ROLES</p> <ul style="list-style-type: none"> <li>-ADMINISTRATOR</li> <li>+ JR ADMIN</li> <li>+ JR ADMIN 3</li> <li>+ LCM ADMIN</li> <li>+ APPROVER</li> <li>+ CATALOG MANAGER</li> <li>+ CHEMICAL MANAGEMENT ONLY</li> <li>+ JUNIOR EDITOR</li> <li>+ LBM ADMINISTRATOR</li> <li>+ LEGAL</li> <li>+ RECEIVING</li> <li>+ REQUISITIONER</li> <li>+ RESEARCHER - DO NOT TOUCH</li> <li>+ SENIOR EDITOR</li> <li>+ SENIOR TECHNICAL WRITER</li> <li>+ SUPPLIER</li> </ul>																																																																																																																										
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ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY																																																																																																																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">SHOPPING/CART</th> <th style="width: 10%;">ORDERS</th> <th style="width: 10%;">APPROVALS</th> <th style="width: 10%;">ACCOUNTS PAYABLE</th> <th style="width: 10%;">ADMINISTRATION</th> <th style="width: 10%;">MATERIALS MGT</th> <th style="width: 10%;">CUSTOM FIELDS PERMISSIONS ?</th> </tr> </thead> <tbody> <tr> <td colspan="7"> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">PERMISSION</th> <th style="width: 10%;">VALUE</th> <th style="width: 10%;">OVERIDE</th> <th style="width: 10%;">PERMISSION</th> <th style="width: 10%;">VALUE</th> <th style="width: 10%;">OVERIDE</th> <th style="width: 10%;">PERMISSION</th> </tr> </thead> <tbody> <tr> <td colspan="7">SYSTEM ADMINISTRATION</td> </tr> <tr> <td>ADMINISTRATION</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>VIEW MY PROFILE</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>USER ADMINISTRATION</td> </tr> <tr> <td>FIELD MANAGEMENT</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>EDIT MY PROFILE</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>LIST MANAGEMENT</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>CHANGE PASSWORD</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>CUSTOM FIELD MANAGEMENT</td> <td></td> <td><input type="checkbox"/></td> <td>EDIT PERSONAL INFORMATION</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>ADDRESS MANAGEMENT</td> <td></td> <td><input type="checkbox"/></td> <td>VIEW ALL USER PROFILES</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>MANAGE SHARED WORKFLOW FOLDERS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>EDIT ALL USER</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>CATALOG MANAGEMENT</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>PROFILES/ROLES/PERMISSIONS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>SYSTEM CONFIGURATION</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>EDIT ROLES/DPT/RELATIONSHIPS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>LICENSE</td> <td></td> <td><input type="checkbox"/></td> <td>EDIT MY SUPERVISOR FOR APPROVALS</td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> <tr> <td>TRANSACTION REPORTS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>EDIT USER'S FINANCIAL APPROVERS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>CATALOG REPORTS</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>CUSTOMIZE NAVIGATION</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> </tr> <tr> <td>USAGE REPORTS</td> <td></td> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>CONSORTIUM REPORTS</td> <td></td> <td><input type="checkbox"/></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> </td> </tr> </tbody> </table>				SHOPPING/CART	ORDERS	APPROVALS	ACCOUNTS PAYABLE	ADMINISTRATION	MATERIALS MGT	CUSTOM FIELDS PERMISSIONS ?	<table border="1" style="width: 100%; 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CONSORTIUM REPORTS		<input type="checkbox"/>																																																																																																																								

**FIG. 4P**

		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EDIT COMPANY MESSAGE		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EDIT RESOURCE INFORMATION		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CONTRACT MANAGER		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CONTRACT OWNER		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ADVANCED DYNAMIC WORKFLOW		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EDIT ITEMS/CATALOGS		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SYNDICATE ITEMS/PRICES		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="button" value="UPDATE"/>		

FIG. 4P (cont)

**W o o l Organization**

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR  6 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.  ?

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS **ROLES** RELATIONSHIP

**ADD CHILD ROLE**

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

SELECTED ROLE: ADMINISTRATOR

446c

ROLE PROPERTIES PURCHASING **PERMISSIONS** MATERIALS MGT HISTORY

SHOPPING/CART | ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS PERMISSIONS ?

PERMISSION	VALUE	OVERIDE	PERMISSION	VALUE	OVERIDE
CREATE CHEMICAL ITEM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	OWN INVENTORY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
ASSIGN APPROVER FOR CHEMICAL ITEM RECORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	MARK FOR DISPOSAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>
APPROVE CHEMICAL ITEM RECORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	DISPOSE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
QUICK CREATE CHEMICAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	REASSIGN	<input type="checkbox"/>	<input checked="" type="checkbox"/>
IMPORT CHEMICAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CORRECT AMOUNT/QUANTITY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EXPORT CHEMICAL	<input type="checkbox"/>	<input checked="" type="checkbox"/>	UPDATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EDIT APPROVED CHEMICAL ITEM RECORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	HISTORY	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SEARCH/VIEW CHEMICAL ITEMS AND CONTAINERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CREATE NEW	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SEARCH/ORDER CHEMICAL FROM INVENTORY	<input type="checkbox"/>	<input checked="" type="checkbox"/>	RECORD USAGE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
BULK IMPORT CHEMICAL RECORDS	<input type="checkbox"/>	<input checked="" type="checkbox"/>	BULK IMPORT CONTAINERS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			MISCELLANEOUS		
			PHYSICAL INVENTORY DETAILS SEARCH	<input type="checkbox"/>	<input checked="" type="checkbox"/>
			EXPORT INVENTORY SEARCH RESULTS	<input type="checkbox"/>	<input checked="" type="checkbox"/>

ROLES

- ADMINISTRATOR
  - + JR ADMIN
  - + JR ADMIN 3
  - + LCM ADMIN
- APPROVER
- CATALOG MANAGER
- CHEMICAL MANAGEMENT ONLY
  - + JUNIOR EDITOR
- LBN ADMINISTRATOR
- LEGAL
- RECEIVING
- REQUISITIONER
- RESEARCHER - DO NOT TOUCH
- SENIOR EDITOR
- SENIOR TECHNICAL WRITER
- SUPPLIER

FIG. 4Q

MANAGE ORGANIZATIONAL RAM LICENSE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ATTACH FILES/URLS IN MATERIALS MGMT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
VIEW RAD SUMMARY ACTION IN PR/PO	<input type="checkbox"/>	<input checked="" type="checkbox"/>	VIEW REPLENISHMENT REPORT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SUPPLIES MANAGER			CYCLE COUNTING	<input type="checkbox"/>	<input checked="" type="checkbox"/>
CREATE SUPPLIES ITEM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	ADMINISTRATION		
ASSIGN APPROVER FOR SUPPLIES ITEM	<input type="checkbox"/>	<input checked="" type="checkbox"/>	LOCATION CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
RECORD			BULK IMPORT LOCATIONS	<input type="checkbox"/>	<input checked="" type="checkbox"/>
APPROVE SUPPLIES ITEM RECORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CONTAINER CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
QUICK CREATE SUPPLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRINTER CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
IMPORT SUPPLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	KIOSK ADMINISTRATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EXPORT SUPPLIES	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CYCLE COUNTING ADMINISTRATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
EDIT APPROVED SUPPLIES ITEM RECORD	<input type="checkbox"/>	<input checked="" type="checkbox"/>	FULFILLMENT CONFIGURATION	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SEARCH/VIEW SUPPLIES ITEMS AND	<input type="checkbox"/>	<input checked="" type="checkbox"/>	PRICING MANAGEMENT	<input type="checkbox"/>	<input checked="" type="checkbox"/>
INVENTORY					
SEARCH/ORDER SUPPLIES FROM	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
INVENTORY					
BULK IMPORT SUPPLIES RECORDS	<input type="checkbox"/>	<input checked="" type="checkbox"/>			
UPDATE					

**FIG. 4Q (cont)**

PROFILE | LOGOUT

6 ITEM(S)

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR

SUPPLIER PROFILE

▼

6 ITEM(S)

▼

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

USER MGT.

USERS

REGISTRATIONS

USER IMPORT

HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT. OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.

DEPARTMENTS

ADMIN

POSITIONS

ROLES

RELATIONSHIP

APPLY ALL CHANGES

ADD CHILD ROLE

SELECT A ROLE TO EDIT OR CREATE NEW ROLES

SELECTED ROLE: ADMINISTRATOR

446c

ROLE PROPERTIES

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

SHOPPING/CART

ORDERS

APPROVALS

ACCOUNTS PAYABLE

ADMINISTRATION

MATERIALS MGT

CUSTOM FIELDS

PERMISSIONS

PERMISSION	VALUE	OVERRIDE	ROLE
VIEW PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	VIEW PERSONAL LIST
EDIT PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT PERSONAL LIST
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	<input type="checkbox"/>	VIEW ORGANIZATION VALUES
CREATE VALUES FOR PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST
VIEW PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	VIEW PERSONAL LIST
EDIT PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	EDIT PERSONAL LIST
VIEW ORGANIZATION VALUES	<input checked="" type="checkbox"/>	<input type="checkbox"/>	VIEW ORGANIZATION VALUES
CREATE VALUES FOR PERSONAL LIST	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST
VIEW PERSONAL LIST	<input type="checkbox"/>	<input type="checkbox"/>	VIEW PERSONAL LIST
EDIT PERSONAL LIST	<input type="checkbox"/>	<input type="checkbox"/>	EDIT PERSONAL LIST
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	<input type="checkbox"/>	VIEW ORGANIZATION VALUES
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST


**FIG. 4R**

REQUEST TYPE	REQUEST TYPE
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
SEARCHABLE CUSTOM FIELD VALUES (51)	<input type="checkbox"/>
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
SERVICE REQUEST	<input type="checkbox"/>
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
SERVICE REQUEST?	<input type="checkbox"/>
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>

UPDATE

**FIG. 4R (cont)**



	PROFILE   LOGOUT USER MANAGEMENT - HR CONFIGURATION	SEARCH FOR <input type="text" value="SUPPLIER PROFILE"/> 6 ITEM(S)
<p>HOME   MY FAVORITES   PRODUCT SEARCH   CARTS   APPROVALS   HISTORY   SETTLEMENT   USER MGT.</p> <p><b>USERS   REGISTRATIONS   USER IMPORT   HR CONFIGURATION</b></p> <p>CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE, TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE". NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE, ONLY INACTIVATE IT.</p> <p>DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP</p>		
<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <b>[ ADD CHILD ROLE ]</b> </div> <p>SELECT A ROLE TO EDIT OR CREATE NEW ROLES</p> <ul style="list-style-type: none"> <li>ROLES</li> <li>- ADMINISTRATOR</li> <li>+ JR ADMIN</li> <li>+ JR ADMIN 3</li> <li>+ LCM ADMIN</li> <li>+ APPROVER</li> <li>+ CATALOG MANAGER</li> <li>+ CHEMICAL MANAGEMENT ONLY</li> <li>+ JUNIOR EDITOR</li> <li>+ LBM ADMINISTRATOR</li> <li>+ LEGAL</li> <li>+ RECEIVING</li> <li>+ REQUISITIONER</li> <li>+ RESEARCHER - DO NOT TOUCH</li> <li>+ SENIOR EDITOR</li> <li>+ SENIOR TECHNICAL WRITER</li> <li>+ SUPPLIER</li> </ul>	<p>SELECTED ROLE: ADMINISTRATOR</p> <hr/> <p>ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY</p> <p>INVENTORY ACCESS</p> <p style="text-align: center;">PROJECTS FROM ANY PARENT ROLES ARE ALREADY AVAILABLE TO THIS ROLE.</p>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;">         AVAILABLE PROJECTS       </div> <ul style="list-style-type: none"> <li>CHEMSTOCK</li> <li>COMBICHEM</li> <li>EDINBURGH RESEARCH GRANT 1</li> <li>EDINBURGH RESEARCH GRANT 2</li> <li>EDINBURGH SURPLUS</li> <li>HIGH EXPRESSION</li> <li>IGF-1 CLONING</li> <li>INVITROGEN RESEARCH GRANT 1</li> <li>INVITROGEN RESEARCH GRANT 2</li> <li>INVITROGEN SURPLUS</li> <li>LCM SAMPLE1</li> </ul>
APPLY ALL CHANGES		

**FIG. 4S**

LOCATION ACCESS

LOCATION GROUPS FROM ANY PARENT ROLES ARE ALREADY AVAILABLE TO THIS ROLE.

AVAILABLE LOCATION GROUPS

EDINBURGH  
GAS CYLINDER OFF SITE LOCATIONS  
INVITROGEN  
OFFICE SUPPLY CENTER  
QIAGEN  
R&D PHARMA - ALL  
R&D PHARMA - LABS  
R&D PHARMA - STOCKROOMS  
SCIQUEST LABS  
SCIQUEST UNIVERSITY  
SELF-SERVICE LAB

☐ ☐

ROLE ASSIGNED LOCATION GROUPS

☐ ☐

**FIG. 4S (cont)**

W O O Organization

PROFILE | LOGOUT

USER MANAGEMENT - HR CONFIGURATION

SEARCH FOR  SUPPLIER PROFILE

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | USER MGT.  ?

USERS | REGISTRATIONS | USER IMPORT | HR CONFIGURATION

CLICK ON A ROLE NAME BELOW TO MODIFY IT, OR SELECT A ROLE AND CLICK "ADD CHILD ROLE" TO CREATE A NEW SUB-ROLE. TO CREATE A NEW TOP-LEVEL ROLE, CLICK ON "ROLES" BEFORE CLICKING "ADD CHILD ROLE."

NOTE: ONCE YOU CLICK "ADD CHILD ROLE" YOU CANNOT DELETE THE NEW ROLE. ONLY INACTIVATE IT.

DEPARTMENTS ADMIN POSITIONS ROLES RELATIONSHIP

SELECTED ROLE: ADMINISTRATOR

ROLES

+ JR ADMIN

+ JR ADMIN 3

+ LCM ADMIN

+ APPROVER

+ CATALOG MANAGER

+ CHEMICAL MANAGEMENT ONLY

+ JUNIOR EDITOR

+ LBM ADMINISTRATOR

+ LEGAL

+ RECEIVING

+ REQUISITIONER

+ RESEARCHER - DO NOT TOUCH

+ SENIOR EDITOR

+ SENIOR TECHNICAL WRITER

+ SUPPLIER

ROLE PROPERTIES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

- FILTERS

START DATE  MM/DD/YYYY

END DATE  MM/DD/YYYY

ACTION

SECTION

EXPORT CSV

?

RESULTS PER PAGE 20 ☐

HISTORY

RECORDS FOUND: 207

DATE ▾ USER ▴ ACTION ▴ SECTION ▴ SELECTION ▴

5:44 AM MICHAEL PUNCHOUT PUNCHOUT ACCESS OFFICE DEPOT

1:09 PM MICHAEL PUNCHOUT PUNCHOUT ACCESS STAPLES INC.

ACCESS REMOVED


FIELD ▴ OLD VALUE NEW VALUE

◀ PAGE 1 ☐ OF 11 ▶

FIG. 4T

3:34 PM	NEIL	PUNCHOUT ACCESS	GATEWAY, INC.	
3:34 PM	NEIL	PUNCHOUT ACCESS	XEROX	
3:34 PM	NEIL	PUNCHOUT ACCESS	FISCHER SCIENTIFIC	
3:34 PM	NEIL	PUNCHOUT ACCESS	WEST PRESS	
3:34 PM	NEIL	PUNCHOUT ACCESS	IKON OFFICE	
7:49 AM	CHRISTINE	PERMISSIONS:	PRODUCTS	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	MODIFY PO	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	CLAUSES IN PRI/PO	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	WITHDRAW PR	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	BYPASS REVIEW	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION		(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	ALLOW EDITING OF TAX	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	SHIPPING, AND HANDLING	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	LINE-LEVEL EXTERNAL	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	ATTACHMENTS	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	VIEW SENSITIVE CREDIT	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	CARD DETAILS	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	SELECT CREDIT CARD	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	FROM PROFILE	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	MANUALLY OVERRIDE	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	PRICING	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	EDIT CREDIT CARD	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION		(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	EDIT PO NUMBER	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION		(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	EDIT USER'S CART	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	ASSIGNEES	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	ASSIGN CARD TO	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	ANOTHER USER	(INHERITED)
7:49 AM	CHRISTINE	PERMISSIONS:	DO NOT PERMIT	FALSE
7:49 AM	CHRISTINE	CART/REQUISITION	PLACE ORDER	(INHERITED)
RESULTS PER PAGE 20		PAGE 1 OF 11		

FIG. 4T (cont)



HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

PROFILE

GO

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

CHANGE PASSWORD

EXPORT

510

510a

510b

510c

510d

510e

510f

520

530

540

550

510a

510b

510c

510d

510e

510f

USER SETTINGS

USERS IDENTIFICATION

PERSONAL SETTINGS

ROLES

DEPARTMENT PERMISSIONS

EMAIL PREFERENCES

NAVIGATION SETUP

510a

510b

510c

510d

510e

510f

FIRST NAME

LAST NAME

PHONE NUMBER

E-MAIL ADDRESS

DEPARTMENT

POSITION

BADGE ID

USER NAME

QUESTION

ANSWER

CONFIRM ANSWER

COUNTRY CODE, AREA, PHONE NUMBER, EXTENSION

ENGINEERING


PROFESSOR

ORGANIZATION TERMS AND CONDITIONS ACCEPTED

TERMS AND CONDITIONS

SAVE

FIG. 5A



HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

PROFILE

GO

6 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

PROFILE/LOGOUT

MY PROFILE

510

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

510c

USERS IDENTIFICATION

PERSONAL SETTINGS

ROLES

DEPARTMENT PERMISSIONS

EMAIL PREFERENCES

NAVIGATION SETUP

CHANGE PASSWORD

SELECT ROLE

ACCOUNTING

CATALOG MANAGER

CHEMICAL MANAGEMENT ONLY

FINANCIAL SEARCHVIEW

JUNIOR ADMIN

JUNIOR ADMIN 2

JUNIOR EDITOR

LBM ADMINISTRATOR

LCM ADMIN

LEGAL

PURCHASING

AUTOMATIC ROLES

APPROVER

REQUISITIONER

ASSIGNED ROLES

ADMINISTRATOR

APPROVER

REQUISITIONER

SUPPLIER

SAVE

FIG. 5B

HOME

MY FAVORITES

MY PROFILE

PROFILE/LOGOUT

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

PROFILE

SETTLEMENT

HISTORY

APPROVALS

CARTS

PRODUCT SEARCH

PERMISSIONS

PURCHASING

510

510e

CHANGE PASSWORD

510

USER SETTINGS

USERS IDENTIFICATION

PERSONAL SETTINGS

ROLES

DEPARTMENT PERMISSIONS

EMAIL PREFERENCES

NAVIGATION SETUP

USER REGISTRATION PENDING APPROVAL

INVENTORY WASTE DISPOSAL REQUEST

NEW PRICE FILE PENDING REVIEW

PR SUBMITTED INTO WORKFLOW

PR PENDING WORKFLOW APPROVAL

PR WORKFLOW NOTIFICATION AVAILABLE

PR LINE ITEM(S) REJECTED

PR REJECTED

PR WORKFLOW STEP ERROR NOTICE

PR WORKFLOW COMPLETE / PO CREATED

PO SUBMITTED INTO WORKFLOW

PO PENDING WORKFLOW APPROVAL

PO WORKFLOW NOTIFICATION AVAILABLE

PO LINE ITEM(S) REJECTED

PO REJECTED

PO WORKFLOW COMPLETE

PO WORKFLOW STEP ERROR NOTICE

PO REQUIRES RECEIPT NOTICE

PO SENT TO SUPPLIER

PO LINE ITEM BACKORDER NOTICE

PO LINE ITEM CANCELLATION NOTICE

PO / PR STATUS REQUEST NOTICES

PUNCHOUT STATUS CHANGED

BARCODE PRINT JOB FAILURE NOTIFICATION

SEARCH RESULT EXPORT CONFIRMATION

PO LINE ITEM SHIP NOTICE

CART ASSIGNED NOTICE

SUBMISSION VALIDATION COMPLETE

SUBMISSION VALIDATION ERROR

SUBMISSION IMPORT COMPLETE


SUBMISSION IMPORT ERROR

SUBMISSION SYNDICATION COMPLETE

SUBMISSION SYNDICATION ERROR

SAVE

FIG. 5C



PROFILE LOGOUT

MY PROFILE

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

PROFILE

?

510f

CHANGE PASSWORD

510

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

USERS IDENTIFICATION

PERSONAL SETTINGS

ROLES

DEPARTMENT PERMISSIONS

EMAIL PREFERENCES

NAVIGATION SETUP

?

PLEASE SELECT THE DESIRED TOP-LEVEL NAVIGATION USING THE DROP DOWN LISTS PROVIDED BELOW. YOUR SELECTIONS WILL BE ORDERED IN THE ORDER DISPLAYED BELOW. ANY OPTIONS THAT ARE NOT SELECTED WILL FALL UNDER AN "OTHER" DROP DOWN LIST IN THE NAVIGATION BAR ITSELF.

INSERT

▽

HOME

REMOVE

INSERT

▽

MY FAVORITES

REMOVE

INSERT

▽

PRODUCT SEARCH

REMOVE

INSERT

▽

CARTS

REMOVE

INSERT

▽

APPROVALS

REMOVE

INSERT

▽

HISTORY

REMOVE

INSERT

▽

SETTLEMENT

REMOVE

UPDATE

RESTORE & UPDATE TO DEFAULTS

**FIG. 5D**



	PROFILE LOGOUT		16 ITEM(S)					
	MY PROFILE		SEARCH FOR SUPPLIER PROFILE					
HOME	MY FAVORITES	PRODUCT SEARCH	CARTS	APPROVALS	HISTORY	SETTLEMENT	PROFILE	GO

USER SETTINGS    PURCHASING    PERMISSIONS    MATERIALS MGT    HISTORY

CUSTOM FIELDS IF FINANCIAL APPROVERS | PURCHASING | APPROVAL LIMITS | ADDRESSES | PRODUCT VIEWS | PUNCHOUT ACCESS

CHANGE PASSWORD

520a	520b	520c	520d	520e	520f	520g
REQUISITION LIMIT						
REQUISITION LINE ITEM LIMIT						
REQUISITION APPROVAL LIMIT						
REQUISITION LINE ITEM APPROVAL LIMIT						
PURCHASE ORDER LIMIT						
PURCHASE ORDER LINE ITEM LIMIT						
PURCHASE ORDER APPROVAL LIMIT						
PURCHASE ORDER LINE ITEM APPROVAL LIMIT						
LIMITED PURCHASE ORDER LIMIT						
LINE ITEM LIMITED PURCHASE ORDER LIMIT						

LIMIT	VALUE	ROLE	OVERRIDE
	100	<input type="checkbox"/>	<input type="checkbox"/>
	50	<input type="checkbox"/>	<input type="checkbox"/>
	200	<input type="checkbox"/>	<input type="checkbox"/>
	100	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>
	0	<input type="checkbox"/>	<input type="checkbox"/>

SAVE

**FIG. 5E**



		PROFILE LOGOUT   6 ITEM(S)									
MY PROFILE		SEARCH FOR SUPPLIER PROFILE   GO									
HOME	MY FAVORITES	PRODUCT SEARCH	CARTS	APPROVALS	HISTORY	SETTLEMENT	PROFILE				
USER SETTINGS		PURCHASING		PERMISSIONS		MATERIALS MGT		HISTORY			
CUSTOM FIELDS/FINANCIAL APPROVALS/PURCHASING/APPROVAL LIMITS   ADDRESSES   PRODUCT VIEWS   PUNCHOUT ACCESS		CHANGE PASSWORD									
520a	520b	520c	520d	520e	520f						
SUPPLIER		AVAILABLE OVERRIDE ROLE		SUPPLIER		AVAILABLE OVERRIDE ROLE					
GRAINGER, INC.		MRO/FACILITIES		OM WORKSPACE		FURNITURE					
AMAZON.COM		BOOKS		ONE WORKPLACE		STEELCASE OFFICE FURNITURE					
APPLIED BIOSYSTEMS		LAB SUPPLIES		CANNON IV, INC.		OFFICE/COMPUTER					
FISHER SCIENTIFIC				CDW							
INVITROGEN				CORPORATE EXPRESS							
KRACKELER SCIENTIFIC, INC.				DELL							
SCIQUEST, INC.				HEWLETT-PACKARD COMPANY							
SIGMA-ALDRICH				INSIGHT							
VINIMAYA				OFFICE DEPOT							
VWR INTERNATIONAL				STAPLES							
				SUM MICROSYSTEMS							
SAVE											

FIG. 5F



PROFILE | LOGOUT

MY PROFILE

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

PROFILE

GO

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

530

CHANGE PASSWORD

SHOPPING CART | ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS | PERMISSIONS

?

PERMISSION	VALUE	OVERIDE	ROLE
<b>SHOPPING</b>			
HOSTED CATALOG SEARCH	✓		
PUNCHOUT	✓		
VIEW/USE FORMS (INCLUDING NON-CATALOG FORM)	✓		
NON-CATALOG CONFIGURATION	×		
BYPASS NON-CATALOG SEARCH	✓		
MODIFY ORDER DISTRIBUTION INFORMATION ON FORMS & POS	×		
CREATE FREE-FORM SUPPLIER ON FORM TEMPLATES	×		
CREATE NEW FORM TEMPLATE	×		
MY FAVORITES	✓		
VIEW ORGANIZATION FAVORITES FORMS	✓		
EDIT ORGANIZATION FAVORITES	×		
VIEW PRODUCT COMPARE	✓		
CHEMICAL RESOURCE	✓		
ANTIBODY RESOURCE	✓		
<b>CART/REQUISITION</b>			
PREPARE REQ FOR ANOTHER USER	✓		
DO NOT PERMIT PLACE ORDER	×		
ASSIGN CART TO ANOTHER USER	×		
EDIT USER'S CART ASSIGNEES	×		
EDIT PO NUMBER	×		
EDIT CREDIT CARD	×		
MANUALLY OVERRIDE PRICING	×		
SELECT CREDIT CARD FROM PROFILE	×		
VIEW SENSITIVE CREDIT CARD DETAILS	✓		
HEADER-LEVEL INTERNAL ATTACHMENTS	✓		
HEADER-LEVEL EXTERNAL ATTACHMENTS	✓		
LINE-LEVEL EXTERNAL ATTACHMENTS	✓		
LINE-LEVEL INTERNAL ATTACHMENTS	✓		
ALLOW EDITING OF TAX, SHIPPING, AND HANDLING	✓		
BYPASS REVIEW	✓		
VIEW LINE ITEM HISTORY	✓		
WITHDRAW PR	✓		
MODIFY PO CLAUSES IN PRPO	×		

SAVE

FIG. 5G

MY PROFILE

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

PROFILE

SEARCH FOR SUPPLIER PROFILE

GO

6 ITEM(S)

?

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

530

CHANGE PASSWORD

SHOPPING/CART

ORDERS

APPROVALS

ACCOUNTS PAYABLE

ADMINISTRATION

MATERIALS MGT

CUSTOM FIELDS

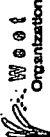
PERMISSIONS

?

PERMISSION	VALUE	PERMISSION	VALUE	OVERWRITE	ROLE
MY ORDERS/ORGANIZATION ORDERS					
VIEW MY ORDERS	✓	FORWARD FULFILLMENT PURCHASE ORDER	x		<input type="checkbox"/>
VIEW ORGANIZATION ORDERS	✓	FULFILL ORDERS	x		<input type="checkbox"/>
EDIT ORGANIZATION ORDERS	✓	DELEGATE FULFILLMENT PURCHASE ORDERS TO	x		<input type="checkbox"/>
REVISE PO	x	ANOTHER APPROVER			<input type="checkbox"/>
CLOSE PURCHASE ORDERS	x				
OPEN PURCHASE ORDERS	x				
RESEND PO TO SUPPLIER	x				
EXPORT SEARCH RESULTS	✓				
MANAGE COMPANY EXPORTS	x				
MANAGE ORDER FAILURE NOTIFICATIONS	x				

SAVE

FIG. 5H


**Organization**

PROFILE/LOGOUT | 16 ITEM(S) | SEARCH FOR SUPPLIER PROFILE | GO

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | PROFILE | ?

USER SETTINGS | PURCHASING | PERMISSIONS | MATERIALS MGT | HISTORY

SHOPPING/CART | ORDERS | APPROVALS | ACCOUNTS PAYABLE | ADMINISTRATION | MATERIALS MGT | CUSTOM FIELDS | PERMISSIONS | ?


CHANGE PASSWORD

PERMISSION	VALUE	OVERRIDE	ROLE
<b>REQUISITION APPROVALS</b>			
EDIT PENDING REQUISITIONS	✓	<input type="checkbox"/>	
APPROVE/REJECT REQUISITIONS	✓	<input type="checkbox"/>	
FORWARD REQUISITIONS	✓	<input type="checkbox"/>	
ORDER CONSOLIDATION	✓	<input type="checkbox"/>	
PUT REQUISITIONS ON HOLD	✓	<input type="checkbox"/>	
EXPEDITE REQUISITIONS	✓	<input type="checkbox"/>	
DELEGATE REQUISITIONS TO ANOTHER APPROVER	✓	<input type="checkbox"/>	
ADD PRODUCTS TO CONSOLIDATED CART	✓	<input type="checkbox"/>	
ADD LINES TO PENDING REQUISITIONS	✓	<input type="checkbox"/>	
RESTART/SKIP REQUISITION WORKFLOW STEPS IN ERROR	✓	<input type="checkbox"/>	
<b>PURCHASE ORDER APPROVALS</b>			
EDIT PENDING PURCHASE ORDERS	✓	<input type="checkbox"/>	
APPROVE/REJECT PURCHASE ORDERS	✓	<input type="checkbox"/>	
FORWARD PURCHASE ORDERS	✓	<input type="checkbox"/>	
PUT PURCHASE ORDERS ON HOLD	✓	<input type="checkbox"/>	
EXPEDITE PURCHASE ORDERS	✓	<input type="checkbox"/>	
DELEGATE PURCHASE ORDERS TO ANOTHER APPROVER	✓	<input type="checkbox"/>	
ADD LINES TO PENDING PURCHASE ORDERS	✓	<input type="checkbox"/>	
RESTART/SKIP PURCHASE ORDERS WORKFLOW STEPS IN ERROR	✓	<input type="checkbox"/>	

530

SAVE

FIG. 51

 Organization	PROFILE   LOGOUT		16 ITEM(S)	
	SEARCH FOR   SUPPLIER PROFILE			
HOME	MY FAVORITES	PRODUCT SEARCH	CARTS	APPROVALS
USER SETTINGS		PURCHASING	PERMISSIONS	MATERIALS MGT
SHOPPING   CART   ORDERS   APPROVALS   ACCOUNTS PAYABLE   ADMINISTRATION   MATERIALS MGT   CUSTOM FIELDS   PERMISSIONS		HISTORY		
PERMISSION		VALUE	OVERRIDE	ROLE
VIEW BUDGET DETAILS	BUDGET	×	□	
CREATE/EDIT BUDGET DETAILS		×	□	
PERMISSION		SETTLEMENT MANAGER		
CREATE/VIEW RECEIPTS		<input checked="" type="checkbox"/>		
ENABLE BLIND RECEIVING (HIDE ORDER QUANTITY DURING RECEIVING)		<input checked="" type="checkbox"/>		
VIEW INVOICES		<input checked="" type="checkbox"/>		
CREATE/EDIT INVOICES		<input checked="" type="checkbox"/>		
SET INVOICE AS PAYABLE		<input checked="" type="checkbox"/>		
SET INVOICE AS PAID		<input checked="" type="checkbox"/>		
MATCH DOCUMENTS WITHIN TOLERANCES		<input checked="" type="checkbox"/>		
FORCE MATCH DOCUMENTS		<input checked="" type="checkbox"/>		
UNMATCH DOCUMENTS		<input checked="" type="checkbox"/>		
RESEND INVOICES TO EXTERNAL SYSTEM		<input checked="" type="checkbox"/>		
CHANGE PASSWORD				
?				

530

SAVE

**FIG. 5J**

Organization

HOME MY FAVORITES PURCHASING PERMISSIONS MATERIALS MGT HISTORY

MY PROFILE

PROFILE LOGOUT

6 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

PROFILE

SETTLEMENT

HISTORY

APPROVALS

CARTS

530

USER SETTINGS

ORDERS

APPROVALS

ACCOUNTS PAYABLE

ADMINISTRATION

MATERIALS MGT

HISTORY

CHANGE PASSWORD

PERMISSION	VALUE	OVERIDE	ROLE
<b>SYSTEM ADMINISTRATION</b>			
ADMINISTRATION	✓		<input type="checkbox"/>
FIELD MANAGEMENT	✓		<input type="checkbox"/>
LIST MANAGEMENT	✓		<input type="checkbox"/>
CUSTOM FIELD MANAGEMENT	x		<input type="checkbox"/>
ADDRESS MANAGEMENT	x		<input type="checkbox"/>
MANAGE SHARED WORKFLOW FOLDERS	✓		<input type="checkbox"/>
CATALOG MANAGEMENT	✓		<input type="checkbox"/>
SYSTEM CONFIGURATION	✓		<input type="checkbox"/>
LICENSE	x		<input type="checkbox"/>
TRANSACTION REPORTS	✓		<input type="checkbox"/>
CATALOG REPORTS	✓		<input type="checkbox"/>
USAGE REPORTS	x		<input type="checkbox"/>
CONSORTIUM REPORTS	x		<input type="checkbox"/>
EDIT COMPANY MESSAGE	✓		<input type="checkbox"/>
EDIT RESOURCE INFORMATION	✓		<input type="checkbox"/>
CONTRACT MANAGER	x		<input type="checkbox"/>
CONTRACT OWNER	x		<input type="checkbox"/>
ADVANCED DYNAMIC WORKFLOW	x		<input type="checkbox"/>
EDIT ITEMS/CATALOGS	✓		<input checked="" type="checkbox"/>
SYNDICATE ITEMS/PRICES	✓		<input checked="" type="checkbox"/>
<b>SAVE</b>			

PERMISSION	VALUE	OVERIDE	ROLE
<b>USER ADMINISTRATION</b>			
VIEW MY PROFILE	✓		<input type="checkbox"/>
EDIT MY PROFILE	✓		<input type="checkbox"/>
CHANGE PASSWORD	✓		<input type="checkbox"/>
EDIT PERSONAL INFORMATION	✓		<input type="checkbox"/>
VIEW ALL USER PROFILES	✓		<input type="checkbox"/>
EDIT ALL USER PROFILES/ROLES/PERMISSIONS	✓		<input type="checkbox"/>
EDIT ROLES/ROLES/DEPTS/RELATIONSHIPS	✓		<input type="checkbox"/>
EDIT MY SUPERVISOR FOR APPROVALS	✓		<input type="checkbox"/>
EDIT USER'S FINANCIAL APPROVERS	✓		<input type="checkbox"/>
CUSTOMIZE NAVIGATION	✓		<input type="checkbox"/>

FIG. 5K

[illegible]

FIG. 5L





		PROFILE   LOGOUT		16 ITEM(S)		SEARCH FOR SUPPLIER PROFILE		GO	
HOME	MY FAVORITES	PRODUCT SEARCH	CARTS	APPROVALS	HISTORY	SETTLEMENT	PROFILE	?	
USER SETTINGS		PURCHASING		PERMISSIONS		MATERIALS MGT		HISTORY	
SHOPPING/CART   ORDERS		APPROVALS		ACCOUNTS PAYABLE		ADMINISTRATION		MATERIALS MGT   CUSTOM FIELDS PERMISSIONS	
PERMISSION		VALUE		OVERRIDE		ROLE		?	
ACCOUNT (CC)		VALUE		OVERRIDE		ROLE		?	
VIEW PERSONAL LIST	✓								
EDIT PERSONAL LIST	✓								
VIEW ORGANIZATION VALUES	✓								
CREATE VALUES FOR PERSONAL LIST	✓								
ACTIVITY (PI)		VALUE		OVERRIDE		ROLE		?	
VIEW PERSONAL LIST	✓								
EDIT PERSONAL LIST	✓								
VIEW ORGANIZATION VALUES	✓								
CREATE VALUES FOR PERSONAL LIST	✓								
CHART-ORG		VALUE		OVERRIDE		ROLE		?	
VIEW PERSONAL LIST	×								
EDIT PERSONAL LIST	×								
VIEW ORGANIZATION VALUES	×								
CREATE VALUES FOR PERSONAL LIST	×								
CUSTODY CODE		VALUE		OVERRIDE		ROLE		?	
VIEW PERSONAL LIST	✓								
EDIT PERSONAL LIST	✓								
VIEW ORGANIZATION VALUES	✓								
CREATE VALUES FOR PERSONAL LIST	✓								
REQUEST TYPE		VALUE		OVERRIDE		ROLE		?	
VIEW PERSONAL LIST	×								
EDIT PERSONAL LIST	×								
VIEW ORGANIZATION VALUES	×								
CREATE VALUES FOR PERSONAL LIST	×								

FIG. 5M

EQUIPMENT TAB		REQUISITION TYPE	
VIEW PERSONAL LIST	<input type="checkbox"/>	VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>	EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
FUND/GRANT (BG/DYN)		SEARCHABLE CUSTOM FIELD VALUES (51)	
VIEW PERSONAL LIST	<input type="checkbox"/>	VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>	EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
LOCATION		SERVICE REQUEST	
VIEW PERSONAL LIST	<input type="checkbox"/>	VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>	EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
ORGANIZATION (SB)		SERVICE REQUEST?	
VIEW PERSONAL LIST	<input type="checkbox"/>	VIEW PERSONAL LIST	<input type="checkbox"/>
EDIT PERSONAL LIST	<input type="checkbox"/>	EDIT PERSONAL LIST	<input type="checkbox"/>
VIEW ORGANIZATION VALUES	<input type="checkbox"/>	VIEW ORGANIZATION VALUES	<input type="checkbox"/>
CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>	CREATE VALUES FOR PERSONAL LIST	<input type="checkbox"/>
[SAVE]			

**FIG. 5M (cont)**



W @ t

Organization

MY PROFILE

PROFILE | LOGOUT

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

GO

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

PROFILE

?

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

INVENTORY ACCESS | INVENTORY ACCESS DEFAULTS

PROJECTS

ROLE ASSIGNED PROJECTS

INVITROGEN SURPLUS

540

CHANGE PASSWORD

AVAILABLE PROJECTS

CHEMSTOCK		
COMBICHEM		
EDINBURGH RESEARCH GRANT 1		
EDINBURGH RESEARCH GRANT 2		
EDINBURGH RESEARCH GRANT 3		
EDINBURGH SURPLUS		
FGH EXPRESSION		
IGT CLONING		
INVITROGEN RESEARCH GRANT 1		
INVITROGEN RESEARCH GRANT 2		
INVITROGEN SURPLUS		
CM SAMPLE 1		

◀

▶

USER ASSIGNED PROJECTS

AVAILABLE LOCATION GROUPS

EDINBURGH		
GAS CYLINDER OFF SITE LOCATIONS		
INVITROGEN		
OFFICE SUPPLY CENTER		
OIA GEN		
R&D PHARMA - ALL		
R&D PHARMA - LABS		
R&D PHARMA - STOCKROOMS		
SCIENCE LABS		
SOCIETY UNIVERSITY		
SELF - SERVICE LAB		

◀

▶

USER ASSIGNED LOCATION GROUPS

LOCATION ACCESS

ROLE ASSIGNED LOCATION GROUP

INVITROGEN

SAVE

FIG. 5N

MY PROFILE

PROFILE | LOGOUT

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

SEARCH FOR SUPPLIER PROFILE

GO

6 ITEM(S)

PROFILE

?

USER SETTINGS

PURCHASING

PERMISSIONS

MATERIALS MGT

HISTORY

INVENTORY ACCESS

INVENTORY ACCESS DEFAULTS

1

DEFAULT PROJECT

LOCATION NAME

SELECT LOCATION

CHANGE PASSWORD

?

PREFERRED LOCATION

LOCATION

INVITROGEN>CHEMISTRY BUILDING>CHEM STOCKROOM 1	<input type="checkbox"/>
INVITROGEN>CHEMISTRY BUILDING>CHEM STOCKROOM 2	<input type="checkbox"/>
INVITROGEN>BIOTECHNICAL CENTER>LAB 1	<input type="checkbox"/>
INVITROGEN>BIOTECHNICAL CENTER>LAB 2	<input type="checkbox"/>

SAVE

FIG. 50

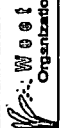

 <b>Organization</b>										<b>PROFILE   LOGOUT</b>										<b>ORDERING CONFIGURATION - PAYMENT METHOD</b>										<b>16 ITEM(S)</b>																																																	
<a href="#">HOME</a>										<a href="#">MY FAVORITES</a>										<a href="#">PRODUCT SEARCH</a>										<a href="#">CARTS</a>										<a href="#">APPROVALS</a>										<a href="#">HISTORY</a>										<a href="#">SETTLEMENT</a>										<a href="#">GO</a>									
<b>ORDERING   MESSAGE BOARD   TERMS AND CONDITIONS   SYSTEM   SEARCH   ADMIN IMPORT/EXPORT</b>										<a href="#">? ?</a>										<a href="#">? ?</a>										<a href="#">? ?</a>										<a href="#">? ?</a>										<a href="#">? ?</a>										<a href="#">? ?</a>																			
<b>PAYMENT METHOD</b>										<b>TAX</b>										<b>SHIPPING/HANDLING</b>										<b>SETTLEMENT-A/P</b>										<b>PO TERMS</b>										<b>ORDER DISTRIBUTION</b>										<b>HISTORY</b>										<b>APPLY ALL CHANGES</b>									
<b>SELECT A PAYMENT METHOD AND ORDER REFERENCE NUMBER METHOD</b>										<b>PCARD</b>										<b>GE V/PAYMENT</b>										<b>PURCHASE ORDER</b>										<b>600</b>																																							
USE PCARD										X <input checked="" type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
PO NUMBERING SCHEME										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
REQUIRE CARD SECURITY CODE										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
USE GE V/PAYMENT										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
PO NUMBERING SCHEME										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
DEFAULT EXPIRATION DAYS										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
CARDHOLDER NAME										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
USE PO										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
PO NUMBERING SCHEME										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
ALLOW FREE-FORM PO NUMBERS										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD										X <input type="checkbox"/> WHEEL-PCARD																													
SAVE										SAVE										SAVE										SAVE										SAVE																																							

FIG. 6A



Organization

16 ITEM(S)

PROFILE | LOGOUT

ORDERING CONFIGURATION - TAX

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

ORDER DISTRIBUTION

HISTORY

ORDERING MESSAGE BOARD

TERMS AND CONDITIONS

SYSTEM SEARCH

ADMIN IMPORT/EXPORT

PAYMENT METHOD

TAX

SHIPPING/HANDLING

SETTLEMENT-A/P

PO TERMS

ORDER DISTRIBUTION

HISTORY

1) SET THE DEFAULT (ON/OFF) FOR THE "TAXABLE" FLAG FOR ITEMS IN THE CART

2) TURN TAX ESTIMATION FUNCTIONALITY ON OR OFF

MARK ITEMS TAXABLE BY DEFAULT

ENABLE TAX ESTIMATION

ACCEPT TAX CALCULATIONS FROM SCT BANNER

ENABLE AND DEFINE EITHER TAX RATE.

SELECT TO USE TAX1

TAX1 RATE

SELECT TO USE TAX2

TAX2 RATE

SELECT SHIPPING AND/OR HANDLING CHARGES TO BE INCLUDED IN THE TAXABLE AMOUNT.

APPLY TAX TO SHIPPING

APPLY TAX TO HANDLING

TAX RATES

TAXABLE ITEMS

APPLY ALL CHANGES

SAVE

OVERWRITE DEFAULT VALUES

FIG. 6B

<span style="font-size: small; vertical-align: middle;">Web Organization</span>		<b>PROFILE   LOGOUT</b>		<b>16 ITEM(S)</b>									
<b>ORDERING CONFIGURATION - SHIPPING/HANDLING</b>													
HOME	MY FAVORITES	PRODUCT SEARCH	CARTS	APPROVALS	HISTORY								
<b>ORDERING MESSAGE BOARD</b>   TERMS AND CONDITIONS   SYSTEM SEARCH   ADMIN IMPORT/EXPORT		SETTLEMENT-AP	PO TERMS	ORDER DISTRIBUTION	HISTORY								
<b>PAYMENT METHOD</b>		<b>TAX</b>	<b>SHIPPING/HANDLING</b>	<b>APPLY ALL CHANGES</b>									
1) TURN SHIPPING AND HANDLING ESTIMATION FUNCTIONALITY ON OR OFF.													
2) CHOOSE FREIGHT ON BOARD AS ORIGIN OR DESTINATION.													
<b>SHIPPING ESTIMATION</b>													
DEFINE THE SHIPPING TYPE AND RATE, HOW IT IS CALCULATED, AND WHETHER IT IS WAVED OVER A CERTAIN ORDER AMOUNT.													
<table style="width: 100%;"> <tr> <td style="width: 50%;">                 FEE TYPE                  FEE PERCENTAGE                  FEE AMOUNT                  CALCULATE AT LEVEL                  USE THRESHOLD                  THRESHOLD AMOUNT             </td> <td style="width: 50%;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input checked="" type="checkbox"/> </td> <td style="width: 50%;">                             25.000 %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input checked="" type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table> </td> </tr> </table>						FEE TYPE FEE PERCENTAGE FEE AMOUNT CALCULATE AT LEVEL USE THRESHOLD THRESHOLD AMOUNT	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input checked="" type="checkbox"/> </td> <td style="width: 50%;">                             25.000 %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input checked="" type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table>	FLAT FEE <input checked="" type="checkbox"/>	25.000 %	0.00 USD	BY ORDER <input type="checkbox"/>	<input checked="" type="checkbox"/>	200.00 USD
FEE TYPE FEE PERCENTAGE FEE AMOUNT CALCULATE AT LEVEL USE THRESHOLD THRESHOLD AMOUNT	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input checked="" type="checkbox"/> </td> <td style="width: 50%;">                             25.000 %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input checked="" type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table>	FLAT FEE <input checked="" type="checkbox"/>	25.000 %	0.00 USD	BY ORDER <input type="checkbox"/>	<input checked="" type="checkbox"/>	200.00 USD						
FLAT FEE <input checked="" type="checkbox"/>	25.000 %												
0.00 USD	BY ORDER <input type="checkbox"/>												
<input checked="" type="checkbox"/>	200.00 USD												
ENABLE SHIPPING AND HANDLING ESTIMATIONS <input checked="" type="checkbox"/>													
TRANSMIT ESTIMATIONS IN BANNER INTEGRATION <input checked="" type="checkbox"/>													
<b>HANDLING ESTIMATION</b>													
DEFINE THE HANDLING TYPE AND RATE, HOW IT IS CALCULATED, AND WHETHER IT IS WAVED OVER A CERTAIN ORDER AMOUNT.													
<table style="width: 100%;"> <tr> <td style="width: 50%;">                 FEE TYPE                  FEE PERCENTAGE                  FEE AMOUNT                  CALCULATE AT LEVEL                  USE THRESHOLD                  THRESHOLD AMOUNT             </td> <td style="width: 50%;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input type="checkbox"/> </td> <td style="width: 50%;">                             %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table> </td> </tr> </table>						FEE TYPE FEE PERCENTAGE FEE AMOUNT CALCULATE AT LEVEL USE THRESHOLD THRESHOLD AMOUNT	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input type="checkbox"/> </td> <td style="width: 50%;">                             %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table>	FLAT FEE <input type="checkbox"/>	%	0.00 USD	BY ORDER <input type="checkbox"/>	<input type="checkbox"/>	200.00 USD
FEE TYPE FEE PERCENTAGE FEE AMOUNT CALCULATE AT LEVEL USE THRESHOLD THRESHOLD AMOUNT	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">                             FLAT FEE <input type="checkbox"/> </td> <td style="width: 50%;">                             %                         </td> </tr> <tr> <td>                             0.00 USD                         </td> <td>                             BY ORDER <input type="checkbox"/> </td> </tr> <tr> <td> <input type="checkbox"/> </td> <td>                             200.00 USD                         </td> </tr> </table>	FLAT FEE <input type="checkbox"/>	%	0.00 USD	BY ORDER <input type="checkbox"/>	<input type="checkbox"/>	200.00 USD						
FLAT FEE <input type="checkbox"/>	%												
0.00 USD	BY ORDER <input type="checkbox"/>												
<input type="checkbox"/>	200.00 USD												
FEE PERCENTAGE <input checked="" type="checkbox"/>													
FEE AMOUNT <input checked="" type="checkbox"/>													
CALCULATE AT LEVEL <input checked="" type="checkbox"/>													
USE THRESHOLD <input checked="" type="checkbox"/>													
THRESHOLD AMOUNT <input checked="" type="checkbox"/>													
<input type="button" value="SAVE"/>													

FIG. 6C

Woot Organization										PROFILE   LOGOUT										16 ITEM(S)									
SETTLEMENT - A/P										SEARCH FOR SUPPLIER PROFILE										GO									
HOME MY FAVORITES PRODUCT SEARCH CARTS APPROVALS HISTORY SETTLEMENT ORGANIZATION SETUP																													
ORDERING MESSAGE BOARD   TERMS AND CONDITIONS   SYSTEM SEARCH   ADMIN IMPORT/EXPORT																													
PAYMENT METHOD TAX SHIPPING/HANDLING SETTLEMENT-A/P PO TERMS ORDER DISTRIBUTION HISTORY										APPLY ALL CHANGES																			
RECEIPT PARAMETERS																													
TO OVERRIDE THE DEFAULT VALUE FOR RECEIPT NUMBERING OR MATCHING PARAMETERS (MATCHING LICENSE IS TURNED ON) SELECT THE APPROPRIATE OVERRIDE BOX, MODIFY THE PARAMETER AND THEN CLICK SAVE AND FOLLOWED BY APPLY ALL CHANGES FOR CHANGES TO TAKE EFFECT. FOR ADDITIONAL INFORMATION, SELECT THE PARAMETER NAME OR CLICK ?.																													
RECEIPT NUMBERING SCHEME										WHEEL: RECEIPTS																			
CONFIGURE MATCHING PARAMETERS BELOW. THESE PARAMETERS ARE APPLIED AT THE LINE ITEM LEVEL. TO NOT USE A PARAMETER, LEAVE IT BLANK. THESE TOLERANCES ARE ENFORCED BASED ON THE TYPE OF MATCHING PERFORMED AS CONFIGURED IN THE MATCHING PARAMETERS SECTION BELOW. SELECT THIS HELP TEXT FOR ADDITIONAL INFORMATION.																													
RECEIPT QUANTITY DIFFERENCE>=										% OF TOTAL QUANTITY																			
RECEIPT COST DIFFERENCE>=										% OF TOTAL AMOUNT										USD									
NOTIFY USER AT THE TIME OF RECEIPT CREATION										X																			
INVOICE PARAMETERS																													
TO OVERRIDE THE DEFAULT VALUES FOR INVOICING PARAMETERS, SELECT THE OVERRIDE BOX FOR THE APPROPRIATE ITEM AND THEN MODIFY ACCORDINGLY. CLICK SAVE AND THEN APPLY ALL CHANGES FOR CHANGES TO TAKE EFFECT. FOR ADDITIONAL INFORMATION, SELECT ?.																													
INVOICING NUMBERING SCHEME										WHEEL: INVOICES																			

FIG. 6D



CONFIGURE MATCHING PARAMETERS BELOW. THESE PARAMETERS ARE APPLIED AT THE LINE ITEM LEVEL. TO NOT USE A PARAMETER, LEAVE IT BLANK. THESE TOLERANCES ARE ENFORCED BASED ON THE TYPE OF MATCHING PERFORMED AS CONFIGURED IN THE MATCHING PARAMETERS SECTION BELOW. SELECT THIS HELP TEXT FOR ADDITIONAL INFORMATION.

INVOICE QUANTITY DIFFERENCE >=	% OF TOTAL	QUANTITY	<input type="checkbox"/>
INVOICE EXTENDED PRICE >=	% OF TOTAL	AMOUNT	<input type="checkbox"/>
		USD	
NOTIFY USER AT THE TIME OF INVOICE CREATION	<input checked="" type="checkbox"/>		<input type="checkbox"/>

**MATCHING PARAMETERS**

PARAMETERS RELATED TO MATCHING ARE CONFIGURED HERE. VALUES ARE SET ON THE ORGANIZATION SETUP>ORDERING SCREENS ARE THE DEFAULT VALUES FOR ALL SUPPLIERS. THESE VALUES ARE OVERRIDDEN BY SUPPLIER FULFILLMENT CENTER WITHIN THE SUPPLIER PROFILE. A THRESHOLD VALUE CAN BE ESTABLISHED TO ALLOW FOR TWO TYPES OF MATCHING BASED ON THE PO (OR INVOICE FOR 2 WAY MATCHING INVOICE-RECEIPT) TOTAL (NOT INCLUDING SHIPPING, HANDLING, AND TAX). ONE TYPE OF MATCHING CAN BE USED AT OR BELOW THE THRESHOLD AND ANOTHER FOR ABOVE THE THRESHOLD. FOR ADDITIONAL INFORMATION ON EACH PARAMETER, SELECT THE PARAMETER NAME, THIS HELP TEXT, OR THE ?.


MATCHING THRESHOLD	<input type="text" value="100.00"/>	<input checked="" type="checkbox"/>
AT OR BELOW THRESHOLD	<input type="text" value="3 WAY"/>	<input checked="" type="checkbox"/>
ABOVE THRESHOLD	<input type="text" value="3 WAY"/>	<input checked="" type="checkbox"/>

**SHIPPING, HANDLING & TAX PARAMETERS**

IF SHIPPING, HANDLING, AND TAX ARE TO BE USED FOR MATCHING CALCULATIONS, SET THE PARAMETERS IN THIS SECTION. VALUES SET ON THE ORGANIZATION SETUP>ORDERING SCREENS ARE THE DEFAULT VALUES FOR ALL SUPPLIERS. THESE VALUES ARE OVERRIDDEN BY SUPPLIER FULFILLMENT CENTER WITHIN THE SUPPLIER PROFILE. SELECT TO INCLUDE SHIPPING, HANDLING, AND TAX AND THE ASSOCIATED TOLERANCES FOR MATCHING. NOTE: THE PERCENTAGE DIFFERENCE IS RELATIVE TO THE PO TOTAL (NOT INCLUDING S, H&T). FOR ADDITIONAL INFORMATION ON EACH PARAMETER, SELECT THE PARAMETER NAME, THIS HELP TEXT, OR THE ?.

INCLUDE SHIPPING, HANDLING & TAX	<input checked="" type="checkbox"/>	
SHIPPING, HANDLING & TAX DIFFERENCE >=	% OF TOTAL	AMOUNT
		USD
	<input type="checkbox"/>	<input type="checkbox"/>

**FIG. 6D (cont)**



HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

ORDERING - PO CLAUSES SETUP

PROFILE | LOGOUT

ORDERING | MESSAGE BOARD | TERMS AND CONDITIONS | SYSTEM | SEARCH | ADMIN | IMPORT/EXPORT

PAYMENT METHOD

TAX

SHIPPING/HANDLING

SETTLEMENT-A/P

PO TERMS

ORDER DISTRIBUTION

HISTORY

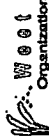
APPLY ALL CHANGES

PO CLAUSE SETUP | PO CLAUSE ORG. DEFAULTS | PO CLAUSE IMPORT/EXPORT | TERMS AND CONDITIONS

NEW CLAUSE

AVAILABLE PO CLAUSES	
CLAUSE NO	CLAUSE NAME
L01	LIMO RATE
V01	VAT EXEMPT
V02	10% RATE

**FIG. 6E**



HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

ORGANIZATION SETUP

PROFILE | LOGOUT

ORDERING - PO CLAUSES ORG. DEFAULTS

ORDERING | MESSAGE BOARD | TERMS AND CONDITIONS | SYSTEM | SEARCH | ADMIN IMPORT/EXPORT

PAYMENT METHOD TAX SHIPPING/HANDLING SETTLEMENT-AP PO TERMS ORDER DISTRIBUTION HISTORY

PO CLAUSE SETUP | PO CLAUSE ORG. DEFAULTS | PO CLAUSE IMPORT/EXPORT | TERMS AND CONDITIONS

16 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

GO

?

APPLY ALL CHANGES

?

ADD CLAUSES

FOR SELECTED PO CLAUSES:

GO

CLAUSE NO	ASSIGNED PO CLAUSES	CLAUSE NAME	CLAUSE TEXT	SELECT
				<div>?</div>
				<input type="checkbox"/>

NO ASSOCIATED CLAUSES

FOR SELECTED PO CLAUSES:

GO

FIG. 6F

PROFILE | LOGOUT

PO CLAUSES - CSV IMPORT/EXPORT

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

ORGANIZATION SETUP

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

ORDERING | MESSAGE BOARD | TERMS AND CONDITIONS | SYSTEM | SEARCH | ADMIN IMPORT/EXPORT

PAYMENT METHOD

TAX

SHIPPING/HANDLING

SETTLEMENT-A/P

PO TERMS

ORDER DISTRIBUTION

HISTORY

PO CLAUSE SETUP | PO CLAUSE ORG. DEFAULTS | PO CLAUSE IMPORT/EXPORT | TERMS AND CONDITIONS

APPLY ALL CHANGES

REQUEST

SELECT THE APPROPRIATE OPTION FROM THE ACTION DROPDOWN AND ENTER THE REQUIRED INFORMATION. FOR FURTHER INFORMATION, CLICK THE ADOBE IMAGE BELOW FOR THE ADMIN GUIDE. FOR A INPUT FILE TEMPLATE, CLICK THE PO CLAUSES CSV TEMPLATE LINK.

ACTION

EXPORT

DESCRIPTION

EXPAND | CLEAR

PO CLAUSES CSV TEMPLATE

SUBMIT

CLICK TO DOWNLOAD...

RECENT ACTIVITY

TO SEE THE LATEST STATUS OF THE LAST FIVE (5) REQUESTS SUBMITTED, CLICK REFRESH. IF THE SUBMITTED REQUEST IS NOT VISIBLE, VIEW ALL SUBMITTED REQUESTS BY CLICKING THE "CLICK HERE FOR ADDITIONAL REQUESTS..." LINK. TO VIEW THE OUTPUT FILE FOR A COMPLETED REQUEST, CLICK THE FILE NAME OR THE "CLICK TO DOWNLOAD..." LINK SO THE FILE CAN BE VIEWED OR SAVED.

NO MATCHING RECORDS FOUND

CLICK HERE FOR ADDITIONAL REQUESTS...

REFRESH

**FIG. 6G**

**FIG. 6H**

**FIG. 6H**



										PROFILE   LOGOUT									
ORDER DISTRIBUTION										6 ITEM(S)									
HOME MY FAVORITES PRODUCT SEARCH CARTS APPROVALS HISTORY SETTLEMENT										SEARCH FOR SUPPLIER PROFILE									
ORDERING MESSAGE BOARD TERMS AND CONDITIONS SYSTEM SEARCH ADMIN IMPORT/EXPORT										ORGANIZATION SETUP									
PAYMENT METHOD TAX SHIPPING/HANDLING SETTLEMENT-AP PO TERMS ORDER DISTRIBUTION HISTORY										APPLY ALL CHANGES									
ORDER DISTRIBUTION DEFAULTS   ORDER DISTRIBUTION OPTIONS										2									
SELECTING 'OVERRIDE DEFAULT VALUES' BELOW WILL MAKE YOUR ORGANIZATION RESPONSIBLE FOR RESENDING ANY ORDERS THAT FAIL WHEN USING THE RESPECTIVE METHODS/DESTINATIONS.																			
CONFIGURATION																			
SEND POS VIA FAX <input checked="" type="checkbox"/>																			
SEND POS VIA FAX FOR FORMS AND NON - CATALOG ITEMS WHEN <input checked="" type="checkbox"/>																			
ELECTRONIC INTERGRATION IS NOT AVAILABLE																			
FAX NUMBER																			
ENABLE MANUAL DISTRIBUTION																			
ENABLE MANUAL DISTRIBUTION FOR FORMS AND NON-CATALOG <input checked="" type="checkbox"/>																			
ITEMS WHEN ELECTRIC INTERGRATION IS NOT AVAILABLE																			
SEND POS VIA EMAIL - PLAIN TEXT FORMAT <input checked="" type="checkbox"/>																			
SEND POS VIA PLAIN TEXT EMAIL FOR FORMS AND NON - CATALOG <input checked="" type="checkbox"/>																			
ITEMS WHEN ELECTRONIC INTERGRATION IS NOT AVAILABLE																			
EMAIL ADDRESS																			
SEND POS VIA EMAIL - HTML IN THE BODY <input checked="" type="checkbox"/>																			
SEND POS VIA HTML IN THE BODY EMAIL FOR FORMS AND NON - <input checked="" type="checkbox"/>																			
CATALOG ITEMS WHEN ELECTRONIC INTERGRATION IS NOT AVAILABLE																			
EMAIL ADDRESS																			
SEND POS VIA EMAIL - HTML ATTACHED <input checked="" type="checkbox"/>																			
SEND POS VIA HTML ATTACHED EMAIL FOR FORMS AND NON - <input checked="" type="checkbox"/>																			
CATALOG ITEMS WHEN ELECTRONIC INTERGRATION IS NOT AVAILABLE																			
EMAIL ADDRESS																			
CREATE PO																			
EXCLUDE FROM CART RETURN																			
USE PR WORKFLOW FOR PUNCH-IN REQUISITIONS																			
MISCELLANEOUS																			
✓ NOTE: POS'S WILL NOT BE CREATED FOR REQUISITIONS WHICH DO NOT USE PR WORKFLOW																			
IF EXCLUDE FROM CHART = TRUE																			
[SAVE]																			

FIG. 61



Web Organization

ORDER DISTRIBUTION

PROFILE | LOGOUT

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

16 ITEM(S)

GO

SEARCH FOR SUPPLIER PROFILE

ORGANIZATION SETUP

ORDERING | MESSAGE BOARD | TERMS AND CONDITIONS | SYSTEM | SEARCH | ADMIN IMPORT/EXPORT

?

PAYMENT METHOD

TAX

SHIPPING/HANDLING

SETTLEMENT-A/P

PO TERMS

ORDER DISTRIBUTION

HISTORY

APPLY ALL CHANGES

?

ORDER DISTRIBUTION DEFAULTS | ORDER DISTRIBUTION OPTIONS

?

USE THE CONTROLS BELOW TO MANAGE ORDER DISTRIBUTION OPTIONS ON FORMS FOR END USERS REQUESTING PRODUCTS FROM FREE FORM SUPPLIERS. SELECT ONE OR MORE OPTIONS.

FAX

EMAIL (PLAIN TEXT)

EMAIL (HTML BODY)

EMAIL (HTML ATTACHMENT)

MANUAL

SAVE

FIG. 6J

W o o t  
Organization

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | WORK FLOW SETUP

REQUISITION | PURCHASE ORDER | FULFILLMENT

PROFILE | LOGOUT

CONFIGURATION - WORK FLOW

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

GO

SHARED WORKFLOW FOLDERS

FOLDERS

BUDGET NOTIFICATIONS  
CAPITAL EXPENSE  
COMPUTER  
COSTCENTER 101-200  
COSTCENTER 201-300  
EH&S  
EXPEDITE  
LPO  
MATH  
MICROBIOLOGY  
NON-CATALOG  
ORDER CONSOLIDATION

710

SELECTED FOLDER

BUDGET NOTIFICATIONS

NAME

ADD USER

APPROVER NAME	USER NAME	EMAIL	PHONE	REMOVE
USER. SUPER	SUSER - APPROVER	SUSER@COMPANY.COM	(000)000-0001	REMOVE
USER. REGULAR	RUSER	RUSER@COMPANY.COM	(000)000-0006	REMOVE
				REMOVE
				REMOVE
				REMOVE
				REMOVE

700

FIG. 7



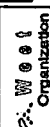
 SEARCH - ALL		PROFILE   LOGOUT		SEARCH FOR SUPPLIER PROFILE		6 ITEM(S)		GO	
HOME		MY FAVORITES		PRODUCT SEARCH		CARTS		APPROVALS	
SEARCH TOOLS		MY FAVORITES		HISTORY		SETTLEMENT		MORE >>	
PRODUCT SEARCH HELP									
<p>THE PRODUCT SEARCH INTERFACE IS USED FOR PERFORMING KEYWORD SEARCHES TO FIND PRODUCTS IN HOSTED CATALOGS. LOGICAL OPERATORS ARE LEVERAGED BY INCLUDING KEYWORDS IN ONE OR MORE OF THE KEYWORD FIELDS, e.g., MUST INCLUDE THE WORDS IS THE EQUIVALENT OF AN AND OPERATOR BEFORE EACH KEYWORD ENTERED. FOR ADDITIONAL INFORMATION ON EACH KEYWORD FIELD, SELECT ITS LABEL NEXT TO THE ENTRY BOX.</p>					<p>FAVORITES QUICK ORDER PRODUCT SEARCH FORMS</p>				
<p>SEARCH • FEATURES</p> <ul style="list-style-type: none"> <li>• SELECT THE ALL CATEGORY FOR SEARCHING ALL HOSTED CATEGORIES SIMULTANEOUSLY.</li> <li>• REMEMBERED PARAMETERS-THE NUMBER OF RESULTS PER PAGE AND THE SELECTION OF THE INCLUDE SIMILAR TERMS CHECK BOX IS REMEMBERED BETWEEN SEARCHES INCLUDING QUICK ORDER. ADDITIONALLY, ENTERED SEARCH TERMS ARE REMEMBERED AS SEARCH CATEGORY IS CHANGED WHEN REFINING SEARCH RESULTS.</li> <li>• INCLUDE SIMILAR TERMS-ALLOWS THE SEARCH METHOD TO BE SWITCHED BETWEEN AN EXACT SEARCH METHOD (SEARCH FOR THE PRECISE TOKENS ENTERED) AND A SEARCH METHOD THAT LOOKS FOR TERMS THAT ARE SIMILAR TO THE ONE ENTERED IN THE SEARCH INTERFACE.</li> <li>• MULTI-SEARCHES MULTIPLE SUPPLIERS, MANUFACTURERS, OR CATALOG NUMBERS CAN BE SEARCHED SIMULTANEOUSLY TO HELP LIMIT SEARCH RESULTS. USE ANY OF THESE SEARCH FIELDS AND SEPARATE THE MULTIPLE VALUES BY A SPACE. ALL PRODUCTS MATCHING THE ENTERED VALUES ARE RETURNED IN SEARCH RESULTS.</li> </ul>					<p>HIDE...</p> <p>ALL CATEGORY SEARCH</p> <p>CATEGORIES</p> <p><input type="radio"/> ALL</p> <p><input type="radio"/> LAB SUPPLIES</p> <p><input type="radio"/> ANTIBODIES</p> <p><input type="radio"/> OFFICE / COMPUTER</p> <p><input type="radio"/> MICRO / FACILITIES</p> <p><input type="radio"/> FURNITURE</p> <p><input type="radio"/> SERVICES</p> <p><input type="radio"/> MANUFACTURING</p> <p><input type="radio"/> BOOKS</p> <p><input type="radio"/> ELECTRONICS</p> <p><input type="radio"/> SPECIALTY</p> <p><input type="radio"/> FOOD / FOOD EQUIPMENT</p> <p><input type="radio"/> SUPPLIES MANAGER</p> <p><input type="radio"/> NON- CATALOG ITEM</p> <p>OTHER SEARCHES</p> <p><input type="radio"/> BROWSE BY SUPPLIER</p> <p><input type="radio"/> BROWSE BY CATEGORY</p> <p><input type="radio"/> BROWSE CONTRACTS</p> <p><input type="radio"/> CHEMICALS</p>				
<p>PRODUCT DESCRIPTION</p> <p><input type="checkbox"/> MUST INCLUDE THE WORDS</p> <p><input type="checkbox"/> INCLUDE ANY OF THE WORDS</p> <p><input type="checkbox"/> INCLUDE EXACT PHRASE</p> <p><input type="checkbox"/> EXCLUDE THE WORDS</p> <p>SUPPLIER NAME</p> <p>MANUFACTURER NAME</p> <p>CATALOG NO. (SKU)</p> <p>VISIBILITY</p> <p><input type="checkbox"/> VIEWABLE</p> <p><input checked="" type="checkbox"/> INCLUDE SIMILAR TERMS</p> <p>PRODUCT PER PAGE</p> <p>20</p> <p>SEARCH</p>					<p>HIDE ADVANCED SEARCH</p> <p>PUNCHOUT</p> <p>LAB SUPPLIES</p> <p>OFFICE / COMPUTER</p> <p>FURNITURE</p> <p>OFFICEMAX</p> <p>Dealer</p>				

FIG. 8A

		<b>PROFILE/LOGOUT</b>		<b>QUICK ORDER-ALL</b>		<b>16 ITEM(S)</b>	
<a href="#">HOME</a>		<a href="#">MY FAVORITES</a>		<a href="#">PRODUCT SEARCH</a>		<a href="#">CARTS</a>	
<a href="#">SEARCH TOOLS</a>		<a href="#">MY FAVORITES</a>		<a href="#">APPROVALS</a>		<a href="#">HISTORY</a>	
<a href="#">SETTLEMENT</a>		<a href="#">SETTLEMENT</a>		<a href="#">SETTLEMENT</a>		<a href="#">SETTLEMENT</a>	
<a href="#">GO</a>		<a href="#">GO</a>		<a href="#">GO</a>		<a href="#">GO</a>	

**QUICK ORDER HELP**

QUICK ORDER IS A QUICK AND EASY WAY TO ADD ITEMS TO THE SHOPPING CART WHEN THE CATALOG NUMBER OR SKU IS KNOWN. QUICK ORDER SEARCHES BOTH THE SUPPLIER AND MANUFACTURER (WHERE PROVIDED BY THE SUPPLIER) CATALOG NUMBERS TO USE QUICK ORDER SELECT THE APPROPRIATE CATEGORY (ALL IF NOT KNOWN), ENTER THE CATALOG NUMBER(S) AND HIT THE ENTER KEY OF SELECT THE ADD TO CURRENT CART BUTTON. IF THE CATALOG NUMBER IS UNIQUE, i.e., THERE IS ONLY ONE PRODUCT WITH THAT CATALOG NUMBER, THE PRODUCT IS AUTOMATICALLY ADDED TO THE CART. INFORMATION FOR AUTOMATICALLY ADDED PRODUCT(S) APPEARS ON THE LEFT SIDE OF THE SCREEN.

IF THE CATALOG NUMBER ENTERED IS NOT UNIQUE, i.e., MORE THAN ONE PRODUCT HAS THE ENTERED CATALOG NUMBER, A LINK FOR SEARCH IS PRESENTED. SELECT THIS LINK TO SEE ALL THE ITEMS MATCHING THE ENTERED CATALOG NUMBER.

IF NO PRODUCTS ARE FOUND FOR THE ENTERED CATALOG NUMBER, A LINK TO THE NON-CATALOG FORM APPEARS. SELECT THIS LINK TO CREATE A NON-CATALOG REQUEST FOR THIS CATALOG NUMBER.

IF THE EXACT CATALOG NUMBER IS NOT KNOWN, SELECT THE INCLUDE SIMILAR TERMS CHECKBOX, THE SEARCH ENGINE WILL TRY TO FIND PRODUCTS WITH CATALOG NUMBERS THAT ARE SIMILAR TO THE ONE ENTERED. SELECTING THIS CHECK BOX IS 'REMEMBERED' BY THE SYSTEM FOR ALL FUTURE SEARCHES, AND IT MUST BE EXPLICITLY TURNED OFF TO DISABLE THIS TYPE OF SEARCHING.

**FAVORITES** | **QUICK ORDER** | **PRODUCT SEARCH** | **FORMS**

**CATEGORIES**

ALL

LAB SUPPLIES

ANTIBODIES

OFFICE / COMPUTER

MRO / FACILITIES

FURNITURE

SERVICES

MANUFACTURING

BOOKS

ELECTRONICS

SPECIALTY

FOOD / FOOD EQUIPMENT

SUPPLIES MANAGER

NON-CATALOG ITEM

**QUICK ORDER SEARCH**

830

CATALOG NO. (SKU)

CATALOG NO. (SKU)

CATALOG NO. (SKU)

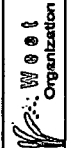
CATALOG NO. (SKU)

CATALOG NO. (SKU)

INCLUDE SIMILAR TERMS ☒

**ADD TO ACTIVE CART**

**FIG. 8B**


 PROFILE | LOGOUT  
 BROWSE BY SUPPLIER

SEARCH FOR SUPPLIER PROFILE  16 ITEM(S)

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | MORE >>  ?

SEARCH TOOLS | MY FAVORITES

- SEARCH FOR SUPPLIER  
 SUPPLIER NAME STARTS WITH   
 SUPPLIER INFORMATION   
 SHOW TYPES  ALL   
 PAGE SIZE  20

SUPPLIER SEARCH RESULTS  
 TOTAL RECORDS FOUND: 868

RESULTS PER PAGE  20


WEIGHT	SUPPLIER NAME	TYPE	PREFERENCE	WEIGHT	SUPPLIER NAME	TYPE	PREFERENCE
100	6MGEL.COM - DO NOT TOUCH	<input type="checkbox"/>	<input type="checkbox"/>	100	ABB SEROTEC	<input type="checkbox"/>	<input type="checkbox"/>
100	A&D WEIGHING	<input type="checkbox"/>	<input type="checkbox"/>	100	ABGENE, INC. / FORMERLY MARCH BIO PRODUCTS	<input type="checkbox"/>	<input type="checkbox"/>
100	A. DAIGER & CO. - DO NOT TOUCH	<input type="checkbox"/>	<input type="checkbox"/>	100	ABRAXIS	<input type="checkbox"/>	<input type="checkbox"/>
100	A.A.A. RAL DIAGNOSTIC STAINS AND REAGENTS CORP	<input type="checkbox"/>	<input type="checkbox"/>	100	ABSOLUTE STANDARDS INC.	<input type="checkbox"/>	<input type="checkbox"/>
100	A.G. SCIENTIFIC - DO NOT TOUCH	<input type="checkbox"/>	<input type="checkbox"/>	100	ABX DIAGNOSTICS INC.	<input type="checkbox"/>	<input type="checkbox"/>
100	A.I. SCIENTIFIC CO. INC. - DO NOT TOUCH	<input type="checkbox"/>	<input type="checkbox"/>	100	ACADEMY BIOMEDICAL COMPANY	<input type="checkbox"/>	<input type="checkbox"/>
100	AA PESCE GLASS CO.	<input type="checkbox"/>	<input type="checkbox"/>	100	ACCURATE CHEMICAL AND SCIENTIFIC	<input type="checkbox"/>	<input type="checkbox"/>
100	AALBORG INSTRUMENTS & CONTROLS INC.	<input type="checkbox"/>	<input type="checkbox"/>	100	ACCURATE SURGICAL & SCIENTIFIC INSTRUMENTS CORP. / ASSI	<input type="checkbox"/>	<input type="checkbox"/>
100	ABACUS SCIENTIFIC COMPANY - DO NOT TOUCH	<input type="checkbox"/>	<input type="checkbox"/>	100	ACCUSTANDARD INC.	<input type="checkbox"/>	<input type="checkbox"/>
100	ADCR GMBH & CO. KG	<input type="checkbox"/>	<input type="checkbox"/>	100	ACE GLASS INC.	<input type="checkbox"/>	<input type="checkbox"/>

RESULTS PER PAGE  20

LEGEND | ?

4 PAGE  1  OF 44

FIG. 8C



PROFILE | LOGOUT

BROWSE BY CATEGORY

SEARCH FOR SUPPLIER PROFILE

16 ITEM(S)

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

MORE >>

?

SEARCH TOOLS

MY FAVORITES

CATEGORIES

CATEGORY SEARCH > FURNITURE > FURNITURE AND FURNISHINGS > ACCOMMODATION FURNITURE > OUTDOOR FURNITURE

LAB SUPPLIES

OFFICE COMPUTER

MRO / FACILITIES

FURNITURE

FURNITURE AND FURNISHINGS VIEW (INCL. SUB-CATEGORIES)

ACCOMMODATION FURNITURE VIEW (INCL. SUB-CATEGORIES)

BABY AND TODDLER FURNITURE AND ACCESSORIES VIEW (INCL. SUB-CATEGORIES)

FURNITURE VIEW (INCL. SUB-CATEGORIES)

GENERAL FURNITURE PARTS AND ACCESSORIES VIEW (INCL. SUB-CATEGORIES)

OFFICE FURNITURE VIEW (INCL. SUB-CATEGORIES)

OUTDOOR FURNITURE VIEW (INCL. SUB-CATEGORIES)

BICYCLE RACKS VIEW

FLOWER STANDS VIEW

OUTDOOR BENCHES VIEW

OUTDOOR CHAIRS VIEW

OUTDOOR SWINGS VIEW

OUTDOOR TABLE OR PICNIC TABLES VIEW

OUTDOOR UMBRELLAS VIEW

OUTDOOR CLOTHES DRYER VIEW

CLASSROOM AND INSTITUTIONAL FURNITURE AND FIXTURES VIEW (INCL. SUB-CATEGORIES)

COMMERCIAL AND INDUSTRIAL FURNITURE VIEW (INCL. SUB-CATEGORIES)

INFORMATION TECHNOLOGY BROADCASTING AND TELECOMMUNICATIONS VIEW (INCL. SUB-CATEGORIES)

PRINTING AND PHOTOGRAPHIC AND AUDIO AND VISUAL EQUIPMENT AND SUPPLIES VIEW (INCL. SUB-CATEGORIES)

SERVICE INDUSTRY MACHINERY AND EQUIPMENT AND SUPPLIES VIEW (INCL. SUB-CATEGORIES)

STRUCTURES AND BUILDING AND CONSTRUCTION AND MANUFACTURING COMPONENTS AND SUPPLIES VIEW (INCL. SUB-CATEGORIES)

SERVICES

MANUFACTURING

BOOKS


ELECTRONICS

SPECIALTY

FOOD/FOOD EQUIPMENT

SUPPLIES MANAGER

FIG. 8D



Organization

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

CATALOG MGT

?

PROFILE | LOGOUT

SUPPLIER LIST

16 ITEM(S)

CREATE NEW SUPPLIER 920

SEARCH BY WHOLE OR PARTIAL SUPPLIER NAME.

-SEARCH FOR SUPPLIER

SUPPLIER NAME STARTS WITH

SUPPLIER INFORMATION

SHOW

STATUS

PAGE SIZE

ALL

20

SEARCH

SUPPLIERS | CATEGORIES | SUPPLIER CLASSES | CATEGORY CLASSES | 930

PRICING | MAP ATTRIBUTES | CONSORTIUM MGT | ENABLEMENT

940

950

960

970

980

APPLY ALL CHANGES

900

FIG. 9A

PROFILE   LOGOUT		SEARCH FOR SUPPLIER PROFILE <input type="checkbox"/> 6 ITEM(S)
SELECT CATEGORIES FOR CATALOG		
HOME	MY FAVORITES	PRODUCT SEARCH
SUPPLIERS	CATEGORIES	CATEGORY CLASSES
	CARTS	APPROVALS
	HISTORY	SETTLEMENT
	MAP ATTRIBUTES	CATALOG MGT
	CONSORTIUM MGT	ENABLEMENT
		?

920
APPLY ALL CHANGES

CATEGORY SEARCH > BOOKS > PUBLISHED PRODUCTS > ELECTRONIC REFERENCE MATERIAL > ELECTRONIC SOFTWARE REFERENCE MATERIAL LEGEND | ?

---

CATEGORIES

RESULT GLOBAL (ON/OFF) TOGGLE

☒ LAB SUPPLIES

☒ OFFICE SUPPLIES

☒ MICRO / FACILITIES

☒ FURNITURE

☒ SERVICES

☒ MANUFACTURING

☐ BOOKS

☒ MUSICAL INSTRUMENTS AND GAMES AND TOYS AND ARTS AND CRAFTS AND EDUCATIONAL EQUIPMENT AND MATERIALS AND ACCESSORIES AND SUPPLIES

☒ PUBLISHED PRODUCTS

☒ ELECTRONIC REFERENCE MATERIAL

☒ ELECTRONIC PUBLICATIONS AND MUSIC

☒ ELECTRONIC SOFTWARE REFERENCE MATERIAL

☒ ELECTRONIC SOFTWARE OR USER MANUALS

☒ PRINTED MEDIA


☒ ELECTRONICS

☒ SPECIALTY

☒ FOOD/FOOD EQUIPMENT

☒ SUPPLIES MANAGER

**FIG. 9B**

	PROFILE   LOGOUT CATALOG MANAGEMENT - SUPPLIER CLASSES/DEFINITIONS	SEARCH FOR SUPPLIER PROFILE <input type="checkbox"/> I 6 ITEM(S)  <input checked="" type="checkbox"/> HOME   MY FAVORITES   PRODUCT SEARCH   CARTS   APPROVALS   HISTORY   SETTLEMENT   CATALOG MGT   <input checked="" type="checkbox"/> SUPPLIERS   CATEGORIES   SUPPLIER CLASSES   CATEGORY CLASSES   PRODUCT VIEWS   PRICING   MAP ATTRIBUTES   CONSORTIUM MGT   ENABLEMENT ? <b>930</b> <input type="button" value="APPLY ALL CHANGES"/>													
SELECT A CLASS OR DEFINITION FROM THE LIST BELOW TO EDIT OR TO REDEFINE															
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; padding: 5px;">CLASSES/DEFINITIONS</th> </tr> </thead> <tbody> <tr><td style="padding: 5px;">INTERNAL STORES</td></tr> <tr><td style="padding: 5px;">INVENTORY</td></tr> <tr><td style="padding: 5px;">LOCAL PREFERRED VENDOR</td></tr> <tr><td style="padding: 5px;">STATE CONTRACT</td></tr> <tr><td style="padding: 5px;">DIVERSIFIED VENDOR</td></tr> <tr><td style="padding: 5px;">MINORITY - CERTIFIED WOMEN OWNED BUSINESS</td></tr> <tr><td style="padding: 5px;">ORGANIZATION CONTRACT</td></tr> <tr><td style="padding: 5px;">PREFERRED DISTRIBUTORS</td></tr> <tr><td style="padding: 5px;">CONTRACT SUPPLIERS</td></tr> <tr><td style="padding: 5px;">THE FIFTH MOST PREFERRED SUPPLIER</td></tr> <tr><td style="padding: 5px;">(AT) DISABLED BUSINESS ENTERPRISE</td></tr> <tr><td style="padding: 5px;">(AT) DISABLED VETERAN BUSINESS ENTERPRISE</td></tr> </tbody> </table>			CLASSES/DEFINITIONS	INTERNAL STORES	INVENTORY	LOCAL PREFERRED VENDOR	STATE CONTRACT	DIVERSIFIED VENDOR	MINORITY - CERTIFIED WOMEN OWNED BUSINESS	ORGANIZATION CONTRACT	PREFERRED DISTRIBUTORS	CONTRACT SUPPLIERS	THE FIFTH MOST PREFERRED SUPPLIER	(AT) DISABLED BUSINESS ENTERPRISE	(AT) DISABLED VETERAN BUSINESS ENTERPRISE
CLASSES/DEFINITIONS															
INTERNAL STORES															
INVENTORY															
LOCAL PREFERRED VENDOR															
STATE CONTRACT															
DIVERSIFIED VENDOR															
MINORITY - CERTIFIED WOMEN OWNED BUSINESS															
ORGANIZATION CONTRACT															
PREFERRED DISTRIBUTORS															
CONTRACT SUPPLIERS															
THE FIFTH MOST PREFERRED SUPPLIER															
(AT) DISABLED BUSINESS ENTERPRISE															
(AT) DISABLED VETERAN BUSINESS ENTERPRISE															

**FIG. 9C**

W o o t  
Organization

HOME | MY FAVORITES | PRODUCT SEARCH | CATALOG MGT |  
SUPPLIERS | CATEGORIES | SUPPLIER CLASSES | CATEGORY CLASSES | PRODUCT VIEWS | PRICING | MAP ATTRIBUTES | CONSORTIUM MGT | ENABLEMENT ?

PROFILE | LOGOUT

CATALOG MANAGEMENT - CATEGORY CLASSES/DEFINITIONS

SEARCH FOR SUPPLIER PROFILE | 6 ITEM(S)

APPLY ALL CHANGES

940

DEFINITIONS | CONFIGURATION ?

CLASSES/DEFINITIONS

ERM CATEGORIES  
ERM CATEGORIES 2 (ALT VIEW CLASS)  
NON-RADIOACTIVE CATEGORIES  
NON-SCIENTIFIC  
RETURN TO MDL  
CATEGORY CLASS 04  
CATEGORY CLASS 05  
CATEGORY CLASS 06  
CATEGORY CLASS 07  
CATEGORY CLASS 08  
CATEGORY CLASS 09  
CATEGORY CLASS 10

FIG. 9D



W O O T

Organization

HOME

CATEGORIES

SUPPLIERS

MY FAVORITES

PRODUCT SEARCH

CARTS

APPROVALS

HISTORY

SETTLEMENT

CATALOG MGT

?

PROFILE | LOGOUT

CATALOG MANAGEMENT - PRODUCT VIEWS

SEARCH FOR SUPPLIER PROFILE

16 ITEM(S)

DEFINITIONS

SUPPLIERS

CATEGORIES

SPECIAL RULES

950

APPLY ALL CHANGES

CREATE NEW VIEW

PRODUCT VIEWS

ERM

ERM ALT VIEW

INVITROGEN STOCKROOM

NO ACCESS TO DEMO STOCKROOM

NO RAD RULES

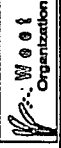
NON SCIENTIFIC

QIAGEN VMI

RADS ONLY

SIGMA ALDRICH VMI

FIG. 9E


[HOME](#) | [MY FAVORITES](#) | [PRODUCT SEARCH](#) | [CARTS](#) | [APPROVALS](#) | [HISTORY](#) | [SETTLEMENT](#) | [CATALOG MGT](#) | [SUPPLIERS](#) | [CATEGORIES](#) | [SUPPLIER CLASSES](#) | [CATEGORY CLASSES](#) | [PRODUCT VIEWS](#) | [PRICING](#) | [MAP ATTRIBUTES](#) | [CONSORTIUM MGT](#) | [ENABLEMENT](#) | [?](#)

[PRICE SETS](#) | [SCIENCE CATALOG](#) | [PRICE REVIEW FILES](#)

[-PRICE SET SEARCH](#)  
 SUPPLIER NAME/ID:  
 PRICE SET TYPE:  
 PRICE SET VERSION STATUS:  
 SHOW AUDIT HISTORY OF PRICE SETS:

SEARCH FOR SUPPLIER

☐ ALL  
☐ NOT REVIEWED

SEARCH

SEARCH FOR SUPPLIER PROFILE ☐ 16 ITEM(S)

960 970

PRICE SET VERSIONS BECOME EFFECTIVE IMMEDIATELY UPON APPROVAL. NEW PRODUCTS REQUIRE A SEARCH LOAD BEFORE THEY BECOME VIEWABLE. SEARCH LOADS ARE DONE MONDAY THROUGH FRIDAY EVENINGS.

[-HIDE PRICE SET DETAILS](#)

APPROVE SELECTED PRICE SET VERSIONS ☐ GO

RESULTS PER PAGE  TOTAL NUMBER OF RESULTS FOUND: 9

VERSION	NOTE	DATE AVAILABLE	REVIEWED BY...	DATE REVIEWED	DATE EFFECTIVE	COMMENTS	CURRENCY	CONTRACT	PRICE SET TYPE	EDIT
4	GE HEALTHCARE BIO SCIENCE_WEE... MORE...	6:37 PM	BOB TRAUB	7:23 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...
3	CURRENT-1	8:37 PM	BOB TRAUB	7:23 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...
1	CORPORATE EXPRESS_WEE_102560... MORE...	7:06 AM	BOB TRAUB	7:06 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...
0		11:19 PM	BOB TRAUB	7:06 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...
3		8:46 AM	BOB TRAUB	7:08 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...
2		5:38 AM	BOB TRAUB	7:08 AM			USD	NO CONTRACT	ORGANIZATION	EDIT...

FIG. 9F

GRAINGER, INC.		ORGANIZATION PRICE			USD	NO CONTRACT	ORGANIZATION	EDIT...
VERSION	NOTE	DATE AVAILABLE	REVIEWED BY...	DATE REVIEWED	DATE EFFECTIVE	COMMENTS	STATUS	SELECT
1	GRAINGER WEET_102410.CSV WAS T...MORE...	6:15 PM					NOT REVIEWED	<input type="checkbox"/>
0		7:05 PM					IMPLICITLY APPROVED	<input type="checkbox"/>
MATRIX TECHNOLOGIES		ORGANIZATION PRICE			USD	NO CONTRACT	ORGANIZATION	EDIT...
VERSION	NOTE	DATE AVAILABLE	REVIEWED BY...	DATE REVIEWED	DATE EFFECTIVE	COMMENTS	STATUS	SELECT
1		12:29 PM				PRICING UPDATE	NOT REVIEWED	<input type="checkbox"/>
0		11:19 PM					IMPLICITLY APPROVED	<input type="checkbox"/>
OFFICE MAX		ORGANIZATION PRICE			USD	NO CONTRACT	ORGANIZATION	EDIT...
VERSION	NOTE	DATE AVAILABLE	REVIEWED BY...	DATE REVIEWED	DATE EFFECTIVE	COMMENTS	STATUS	SELECT
1	OFFICE_MAX_CONTRACT_WEET_10239... MORE...	11:27 AM					NOT REVIEWED	<input type="checkbox"/>
0		11:19 PM					IMPLICITLY APPROVED	<input type="checkbox"/>
SCIOQUEST, INC		ORGANIZATION PRICE			USD	NO CONTRACT	ORGANIZATION	EDIT...
VERSION	NOTE	DATE AVAILABLE	REVIEWED BY...	DATE REVIEWED	DATE EFFECTIVE	COMMENTS	STATUS	SELECT
6		11:28 AM					NOT REVIEWED	<input type="checkbox"/>
5		7:46 AM				IMPORTING NON-ERRORED ROWS	NOT REVIEWED	<input type="checkbox"/>
4		7:39 AM					NOT REVIEWED	<input type="checkbox"/>
3		10:20 AM					NOT REVIEWED	<input type="checkbox"/>
2		11:40 AM					NOT REVIEWED	<input type="checkbox"/>
1		11:40 AM					NOT REVIEWED	<input type="checkbox"/>
0		7:44 AM					NOT REVIEWED	<input type="checkbox"/>

FIG. 9F (cont)

**FIG. 10**

**FIG. 10**

1120

1120a

1120b

1120c

1120d

1110

1110a

1110b

1110c

1110d

1110e

1110f

1110g

1110h

1110i

1110j

1110k

1110l

1110m

1110n

1110o

1110p

1110q

1110r

1110s

1110t

1110u

1110v

1110w

1110x

1110y

1110z

1110aa

1110ab

1110ac

1110ad

1110ae

1110af

1110ag

1110ah

1110ai

1110aj

1110ak

1110al

1110am

1110an

1110ao

1110ap

1110aq

1110ar

1110as

1110at

1110au

1110av

1110aw

1110ax

1110ay

1110az

1110ba

1110bb

1110bc

1110bd

1110be

1110bf

1110bg

1110bh

1110bi

1110bj

1110bk

1110bl

1110bm

1110bn

1110bo

1110bp

1110bq

1110br

1110bs

1110bt

1110bu

1110bv

1110bw

1110bx

1110by

1110bz

1110ca

1110cb

1110cc

1110cd

1110ce

1110cf

1110cg

1110ch

1110ci

1110cj

1110ck

1110cl

1110cm

1110cn

1110co

1110cp

1110cq

1110cr

1110cs

1110ct

1110cu

1110cv

1110cw

1110cx

1110cy

1110cz

1110da

1110db

1110dc

1110dd

1110de

1110df

1110dg

1110dh

1110di

1110dj

1110dk

1110dl

1110dm

1110dn

1110do

1110dp

1110dq

1110dr

1110ds

1110dt

1110du

1110dv

1110dw

1110dx

1110dy

1110dz

1110ea

1110eb

1110ec

1110ed

1110ee

1110ef

1110eg

1110eh

1110ei

1110ej

1110ek

1110el

1110em

1110en

1110eo

1110ep

1110eq

1110er

1110es

1110et

1110eu

1110ev

1110ew

1110ex

1110ey

1110ez

1110fa

1110fb

1110fc

1110fd

1110fe

1110ff

1110fg

1110fh

1110fi

1110fj

1110fk

1110fl

1110fm

1110fn

1110fo

1110fp

1110fq

1110fr

1110fs

1110ft

1110fu

1110fv

1110fw

1110fx

1110fy

1110fz

1110ga

1110gb

1110gc

1110gd

1110ge

1110gf

1110gg

1110gh

1110gi

1110gj

1110gk

1110gl

1110gm

1110gn

1110go

1110gp

1110gq

1110gr

1110gs

1110gt

1110gu

1110gv

1110gw

1110gx

1110gy

1110gz

1110ha

1110hb

1110hc

1110hd

1110he

1110hf

1110hg

1110hh

1110hi

1110hj

1110hk

1110hl

1110hm

1110hn

1110ho

1110hp

1110hq

1110hr

1110hs

1110ht

1110hu

1110hv

1110hw

1110hx

1110hy

1110hz

1110ia

1110ib

1110ic

1110id

1110ie

1110if

1110ig

1110ih

1110ii

1110ij

1110ik

1110il

1110im

1110in

1110io

1110ip

1110iq

1110ir

1110is

1110it

1110iu

1110iv

1110iw

1110ix

1110iy

1110iz

1110ja

1110jb

1110jc

1110jd

1110je

1110jf

1110jg

1110jh

1110ji

1110jj

1110jk

1110jl

1110jm

1110jn

1110jo

1110jp

1110jq

1110jr

1110js

1110jt

1110ju

1110jv

1110jw

1110jx

1110jy

1110jz

1110ka

1110kb

1110kc

1110kd

1110ke

1110kf

1110kg

1110kh

1110ki

1110kj

1110kk

1110kl

1110km

1110kn

1110ko

1110kp

1110kq

1110kr

1110ks

1110kt

1110ku

1110kv

1110kw

1110kx

1110ky

1110kz

1110la

1110lb

1110lc

1110ld

1110le

1110lf

1110lg

1110lh

1110li

1110lj

1110lk

1110ll

1110lm

1110ln

1110lo

1110lp

1110lq

1110lr

1110ls

1110lt

1110lu

1110lv

1110lw

1110lx

1110ly

1110lz

1110ma

1110mb

1110mc

1110md

1110me

1110mf

1110mg

1110mh

1110mi

1110mj

1110mk

1110ml

1110mm

1110mn

1110mo

1110mp

1110mq

1110mr

1110ms

1110mt

1110mu

1110mv

1110mw

1110mx

1110my

1110mz

1110na

1110nb

1110nc

1110nd

1110ne

1110nf

1110ng

1110nh

1110ni

1110nj

1110nk

1110nl

1110nm

1110nn

1110no

1110np

1110nq

1110nr

1110ns

1110nt

1110nu

1110nv

1110nw

1110nx

1110ny

1110nz

1110oa

1110ob

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1110od

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1110of

1110og

1110oh

1110oi

1110oj

1110ok

1110ol

FIG. 11A

HEWLETT-PACKARD COMPANY MORE INFO...										CONTRACT NO VALUE PO NUMBER TO BE ASSIGNED QUOTE NUMBER	
THE ITEMS WERE RETRIEVED FROM AN EXTERNAL SUPPLIER SITE, THEREFORE YOUR ABILITY TO EDIT OR VIEW THE ITEMS IN THIS APPLICATION MAY BE LIMITED. CLICK THIS MESSAGE FOR MORE DETAILS. THE FOLLOWING LINES CANNOT BE ACCESSED ON THE SUPPLIER'S WEBSITE. CLICK THIS MESSAGE FOR MORE DETAILS. LINE(S): 5 ADD NON-CATALOG ITEM FOR THIS SUPPLIER... PRODUCT DESCRIPTION											
5	HP COMPAQ TC4400 TABLET PC	↔	MORE INFO...	EN358UA#ABA	EA	2,099.00	1	EACH	2,099.00	<input type="checkbox"/>	2,099.00 USD
S.P. RICHARDS CO. MORE INFO...										CONTRACT NO VALUE PO NUMBER TO BE ASSIGNED QUOTE NUMBER	
ADD NON-CATALOG ITEM FOR THIS SUPPLIER... PRODUCT DESCRIPTION											
6	LAPTOP BACKPACK WITH HANDLE, 13-1/2in.W x 7in.D, x 17-1/2in.H BLACK	↔	MORE INFO...	CCS55121	EA	9.99	1	EACH	9.99	<input type="checkbox"/>	19.98 USD
SHIPPING, HANDLING, AND TAX CHARGES ARE CALCULATED AND CHARGED BY EACH SUPPLIER. THE VALUES SHOWN HERE ARE FOR ESTIMATION PURPOSES, BUDGET CHECKING, AND WORKFLOW APPROVALS.										SUBTOTAL 2,148.95 TAX1 0.00 TAX2 0.00 SHIPPING 0.00 HANDLING 0.00 TOTAL 2,148.95 USD	

SEE CONFIGURATION FOR THIS REQUISITION

[SAVE]

**FIG. 11A (cont)**

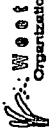
 <b>Organization</b>		<b>PROFILE   LOGOUT</b>		<b>SUMMARY - DRAFT REQUISITION</b>		<b>1110</b>		<b>16 ITEM(S)</b>	
<a href="#">HOME</a>		<a href="#">MY FAVORITES</a>		<a href="#">PRODUCT SEARCH</a>		<a href="#">CARTS</a>		<a href="#">APPROVALS</a>	
<a href="#">ACTIVE CART</a>		<a href="#">DRAFT CARTS</a>		<a href="#">MY FAVORITES</a>		<a href="#">MY REQUISITIONS</a>		<a href="#">HISTORY</a>	
<a href="#">CREATE CART</a>		<a href="#">CREATE CONSOLIDATED CART</a>		<a href="#">ADD PRODUCTS</a>		<a href="#">EDIT CART</a>		<a href="#">REVIEW</a>	
<a href="#">ADD NON-CATALOG ITEM</a>		<a href="#">PR APPROVALS</a>		<a href="#">PO PREVIEW</a>		<a href="#">PR APPROVALS</a>		<a href="#">PO PREVIEW</a>	
<a href="#">SUMMARY</a>		<a href="#">SHIPPING</a>		<a href="#">BILLING</a>		<a href="#">SUPPLIER INFO</a>		<a href="#">TAXES/S&amp;H</a>	
<b>1150</b>		<b>1150a</b>		<b>1150b</b>		<b>1150c</b>		<b>1150d</b>	
<b>GENERAL</b>		<b>SHIPPING</b>		<b>BILLING</b>		<b>EXTERNAL NOTES AND ATTACHMENTS</b>		<b>INTERNAL NOTES AND ATTACHMENTS</b>	
DESCRIPTION NO VALUE NORMAL PREPARED BY PREPARED FOR NEXT APPROVER NO VALUE APPROVER IS NOT SELECTED PRWF POWF		SHIP TO NO ADDRESS REQUIRED FIELD DELIVERY OPTIONS EXPEDITE SHIP VIA REQ DELIVERY BEST CARRIER-BEST WAY X		BILL TO NO ADDRESS REQUIRED FIELD BILLING OPTIONS ACCOUNTING DATA VIEWED BY LINE ITEM...		EXTERNAL NOTES AND ATTACHMENTS NO NOTE NOTE TO ALL SUPPLIERS ATTACHMENTS FOR ALL SUPPLIERS ADD ATTACHMENTS... PO CLAUSES NO CLAUSE		INTERNAL NOTES AND ATTACHMENTS NO NOTE NO VALUE NO VALUE	
<b>FUND/GRANT (BG-DYN)</b>		<b>ORGANIZATION (SB)</b>		<b>ACCOUNTING CODES</b>		<b>PROJECT</b>		<b>ACTIVITY (PI)</b>	
NO VALUE		NO VALUE		NO VALUE EMPTY FIELD		NO VALUE		NO VALUE	
INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENTS...		INTERNAL NOTES AND ATTACHMENTS NO NOTE		EXTERNAL NOTES AND ATTACHMENTS NO NOTE		INTERNAL NOTES AND ATTACHMENTS NO NOTE		INTERNAL NOTES AND ATTACHMENTS NO NOTE	
INTERNAL FIELD CUSTODY CODE EQUIPMENT TAB		NO VALUE NO VALUE		NO VALUE NO VALUE		NO VALUE NO VALUE		NO VALUE NO VALUE	
<b>HIDE LINE DETAILS</b>		<b>SUPPLIER/LINE ITEM DETAILS</b>		<b>FOR SELECTED LINE ITEMS</b>		<b>ADD TO FAVORITES</b>		<b>EDIT</b>	
<b>APPLIED BIOSYSTEMS (2)</b>		<b>MORE INFO...</b>		CONTRACT PO NUMBER QUOTE NUMBER PO CLAUSES NO CLAUSE		NO VALUE TO BE ASSIGNED NO VALUE		<b>EDIT</b>	

FIG. 11B

ADD NON-CATALOG ITEM FOR THIS SUPPLIER...		CATALOG NO.		SIZE/PACKAGING	UNIT PRICE	QUANTITY	EXT PRICE
PRODUCT DESCRIPTION							
1	KIT, LAPTOP COMPUTER 7000 MANUFACTURER NAME MANUFACTURER PART NUMBER UNSPSC: MORE INFO...	4333117	EA	9.99	1 EA	9.99	<input type="checkbox"/> EDIT
TAXABLE CAPITAL EXPENSE COMMODITY CODE REPLENISH STOCK APPLIED BIOSYSTEMS 4333117 43-21-15-03		INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENT... EXTERNAL NOTE ATTACHMENTS FOR SUPPLIER ADD ATTACHMENT... PO CLAUSES NO CLAUSE					
2	KIT, LAPTOP COMPUTER 7000 MANUFACTURER NAME MANUFACTURER PART NUMBER UNSPSC: MORE INFO...	4333117	EA	9.99	1 EA	9.99	<input type="checkbox"/> EDIT
TAXABLE CAPITAL EXPENSE COMMODITY CODE REPLENISH STOCK APPLIED BIOSYSTEMS 4333117 43-21-15-03		INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENT... EXTERNAL NOTE ATTACHMENTS FOR SUPPLIER ADD ATTACHMENT... PO CLAUSES NO CLAUSE					
				SUPPLIER SUBTOTAL 19.98 TAX1 0.00 TAX2 0.00 SHIPPING 0.00 HANDLING 0.00 SUPPLIER TOTAL 19.98 USD			
CDW <input type="checkbox"/> MORE INFO...		CONTRACT PO NUMBER QUOTE NUMBER PO CLAUSES NO CLAUSE		NO VALUE TO BE ASSIGNED NO VALUE		<input type="checkbox"/> EDIT	
VIEW/EDIT BY LINE ITEM...							

FIG. 11B (cont)



MANUFACTURER PART NUMBER		CCS55121		EXTERNAL NOTE		NO NOTE	
UNSPSC:		43-21-16-00		ATTACHMENTS FOR SUPPLIER			
MORE INFO...				ADD ATTACHMENT...			
		COMMODITY CODE		PO CLAUSES			
		REPLENISH STOCK		NO CLAUSE			
		MISCELLANEOUS					
		X					
				SUPPLIER SUBTOTAL		9.99	
				TAX1		0.00	
				TAX2		0.00	
				SHIPPING		0.00	
				HANDLING		0.00	
				SUPPLIER TOTAL		9.99 USD	
SHIPPING, HANDLING, AND TAX CHARGES ARE CALCULATED AND CHARGED BY EACH SUPPLIER. THE VALUES SHOWN HERE ARE FOR ESTIMATION PURPOSES, BUDGET CHECKING, AND WORKFLOW APPROVALS.							
				SUBTOTAL		2,148.95	
				TAX1		0.00	
				TAX2		0.00	
				SHIPPING		0.00	
				HANDLING		0.00	
				TOTAL		2,148.95 USD	
SEE CONFIGURATION FOR THIS REQUISITION							

**FIG. 11B (cont)**

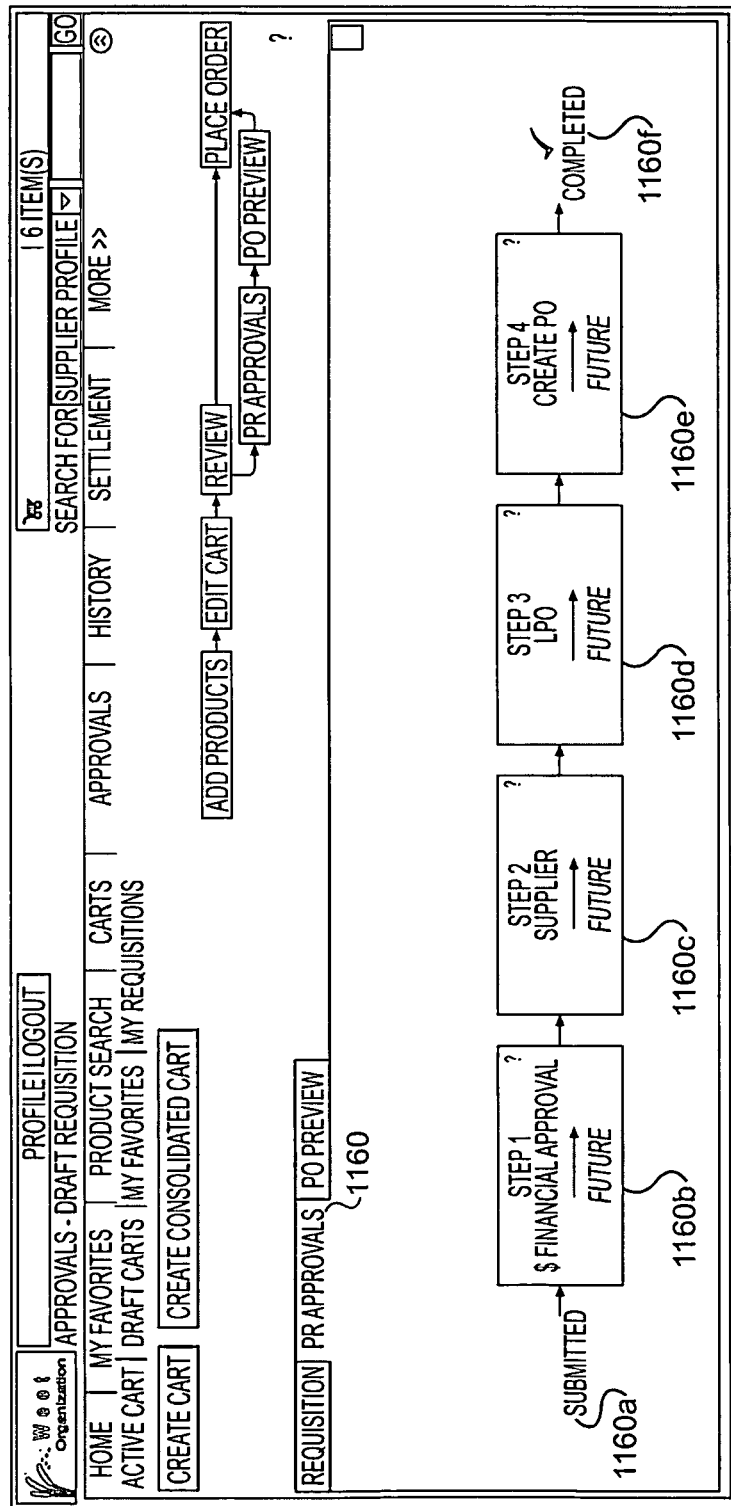


FIG. 11C

Organization

HOME | MY FAVORITES | PRODUCT SEARCH | CATALOGS | APPROVALS | HISTORY | SETTLEMENT | MORE >> ?

PROFILE | LOGOUT

PO PREVIEW - DRAFT REQUISITION

1 6 ITEM(S)

SEARCH FOR SUPPLIER PROFILE

ACTIVE CART | DRAFT CARTS | MY FAVORITES | MY REQUISITIONS

CREATE CART | CREATE CONSOLIDATED CART

REQUISITION | PR APPROVALS | PO PREVIEW

1170

1140

ADD PRODUCTS | EDIT | REVIEW | PR APPROVALS | PO PREVIEW | PLACE ORDER

APPLIED BIOSYSTEMS MORE INFO...

PRODUCT DESCRIPTION	CATALOG NO.	PO NUMBER	SIZE / PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE
1 KIT, LAPTOP COMPUTER 7000	4333117		EA	9.99	1 EA	9.99
2 KIT, LAPTOP COMPUTER 7000	4333117		EA	9.99	1 EA	9.99
PO SUBTOTAL						19.98
TAX1						0.00
TAX2						0.00
SHIPPING						0.00
HANDLING						0.00
PO TOTAL						19.98 USD

CDW MORE INFO...

PRODUCT DESCRIPTION	CATALOG NO.	PO NUMBER	SIZE / PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE
3 3M NOTEBOOK PLATFORM - BLACK	230719		EA	9.99	1 EA	9.99
4 BELKIN CLEARSCREEN OVERLAY	313190		EA	9.99	1 EA	9.99
PO SUBTOTAL						19.98
TAX1						0.00
TAX2						0.00
SHIPPING						0.00
HANDLING						0.00
PO TOTAL						19.98 USD

FIG. 11D

PROFILE | LOGOUT

PO PREVIEW - DRAFT REQUISITION

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | WORKFLOW SETUP ?

REQUISITION | PURCHASE ORDER | FULFILLMENT

SEARCH FOR SUPPLIER PROFILE

6 ITEM(S)

1210

1220

SHARED WORKFLOW FOLDERS

FOLDERS

BUDGET NOTIFICATIONS

CAPITAL EXPENSE

COMPUTER

COSTCENTER 101-200

COSTCENTER 201-300

EH&S

EXPEDITE

LPO

MATH

MICROBIOLOGY

NON-CATALOG

ORDER CONSOLIDATION

1230

1200

SELECTED FOLDER

BUDGET NOTIFICATIONS

NAME

ADD USER

APPROVER NAME

USER NAME

EMAIL

PHONE

REMOVE

REMOVE

REMOVE

REMOVE

REMOVE

REMOVE

FIG. 12

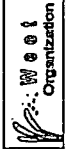
		PROFILE   LOGOUT APPROVALS - REQUISITIONS		SEARCH FOR SUPPLIER PROFILE <input type="checkbox"/> 16 ITEM(S)	
HOME   MY FAVORITES   PRODUCT SEARCH   CARS   APPROVALS   HISTORY   SETTLEMENT   MORE >>		REQUISITION   PURCHASE ORDER			
- FILTERS FILTER		ALL PENDING REQUISITIONS <input type="checkbox"/> 1310 <input type="button" value="SEARCH"/>			
SHOW REQUISITION DETAILS ASSIGN SUBSTITUTE		APPLY ACTION TO SELECTED PR(S) APPROVE/COMPLETE <input type="checkbox"/> 1320			
- MY PR APPROVALS RESULTS PER PAGE <input type="text" value="10"/>		REQUISITIONS FOUND: 0 REQUISITION NO. ▾ STATE ▴ PRIORITY ▴ PR DATE/TIME ▴ REQUISITIONER ▴ AMOUNT ▴ ACTION SELECT <input type="checkbox"/>			

FIG. 13

[illegible]

**FIG. 14**

**PO DEPARTMENTS**

---WORKFLOW---

PENDING

PARTIALLY REJECTED

COMPLETE

---SUPPLIER---

SENT TO SUPPLIER

SUPPLIER PROCESSING

CANCELLED

PARTIALLY SHIPPED

FULLY SHIPPED

OVER SHIPPED

---RECEIPT---

PARTIALLY RECEIVED

FULLY RECEIVED

OVER RECEIVED

---INVOICE---

PARTIALLY INVOICED

FULLY INVOICED

OVER INVOICED

---MATCHING---

PARTIALLY MATCHED

FULLY MATCHED

NO MATCHES

---AP STATUS---

OPEN

CLOSED

**PO STATUS FILTERS**

INCLUDE PO'S WITH ANY OF THESE STATUSES

---SHOW ALL---

◀

▶

◀▶

**PO STATUS**

NO INVOICES

NO RECEIPTS

REQUIRES RECEIPTS

NO SHIPMENTS

WITH CREDITS

WITH RETURNS

WITH CANCELLATION

WITH BACKORDERS

WITH SUPPLIER MODIFICATIONS

WITH FORCED MATCHES

**ONLY INCLUDE PO'S WITH THESE STATUSES**

---SHOW ALL---

SEARCH

**FIG. 14 (cont)**

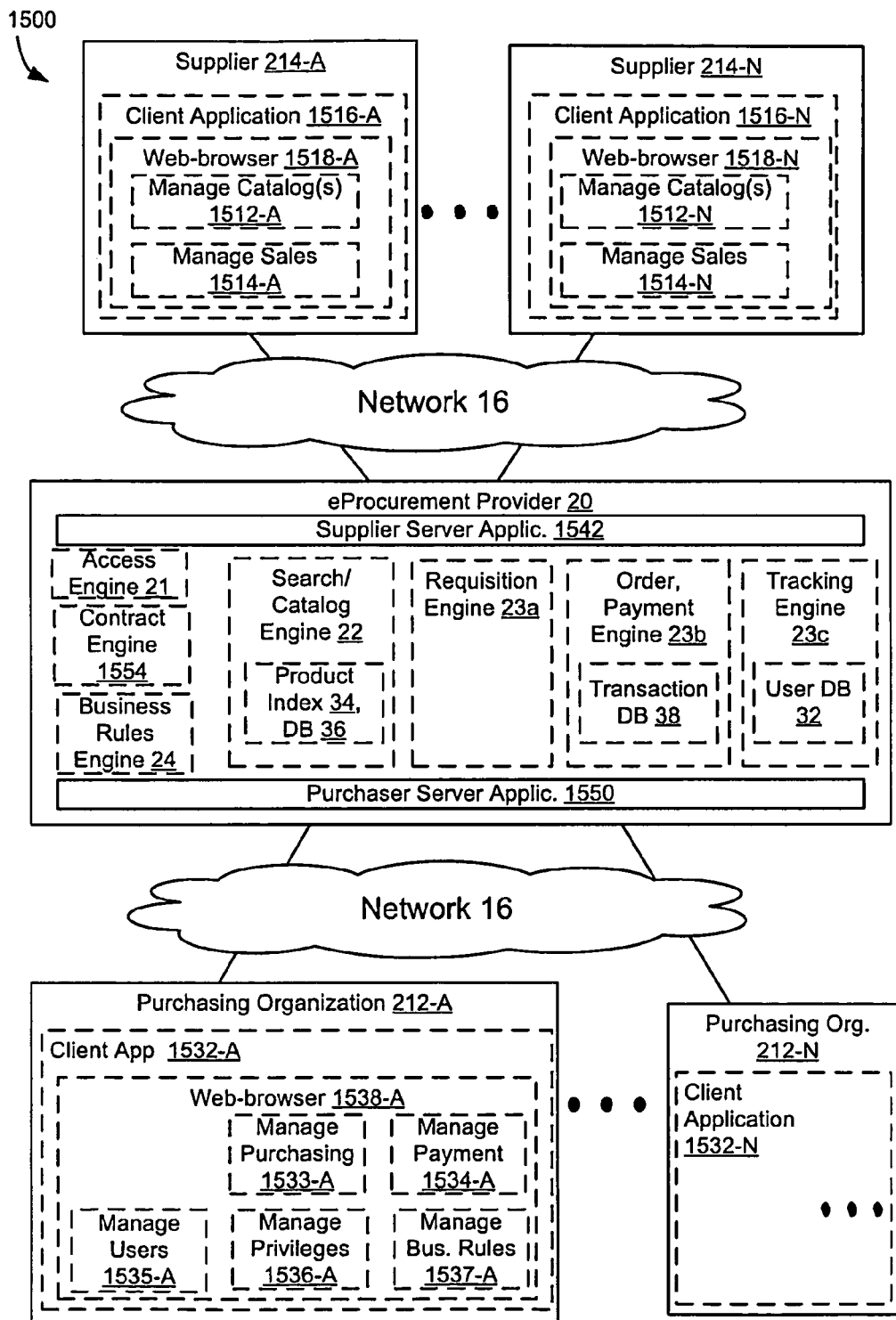


Figure 15



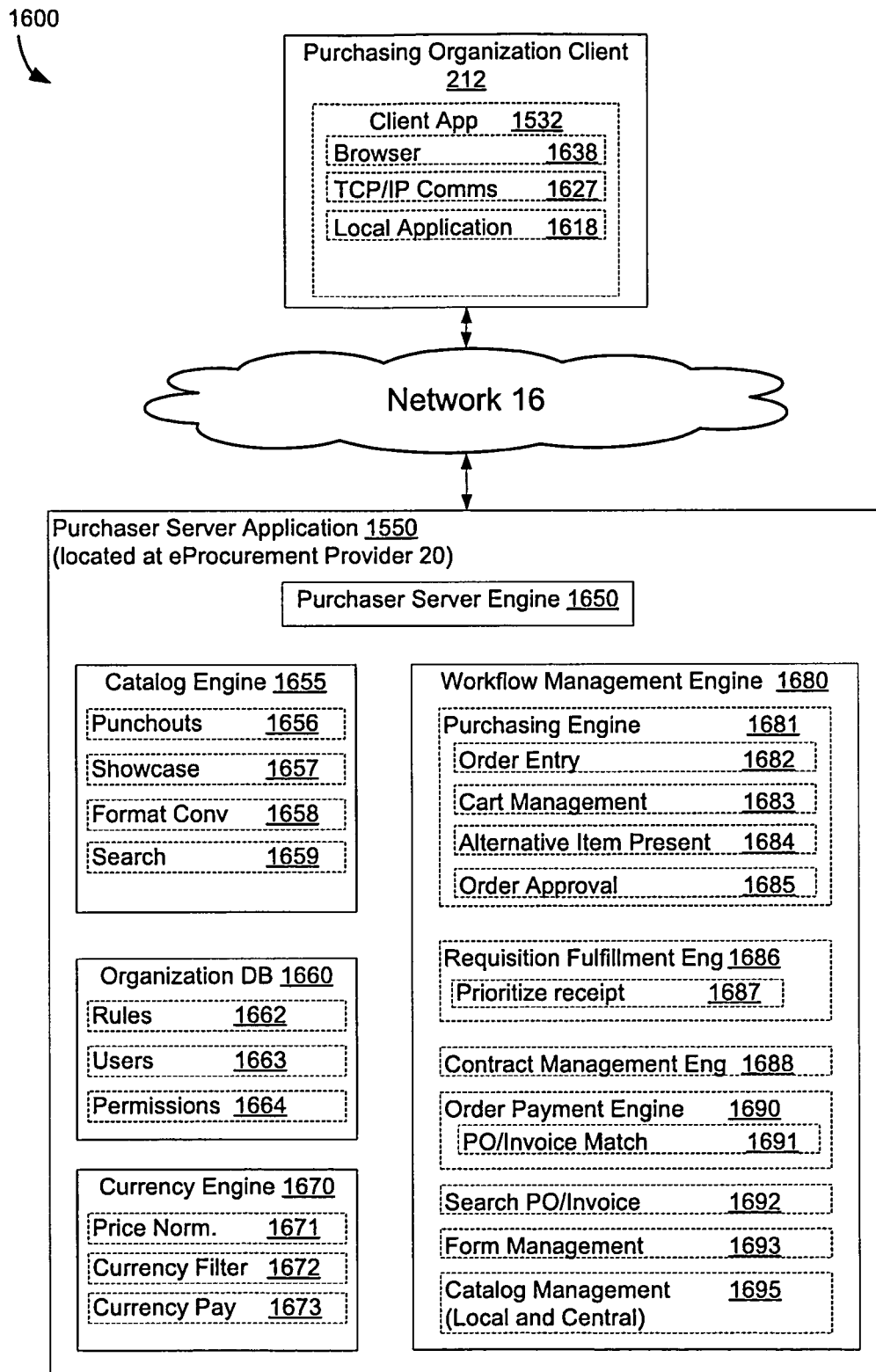


Figure 16

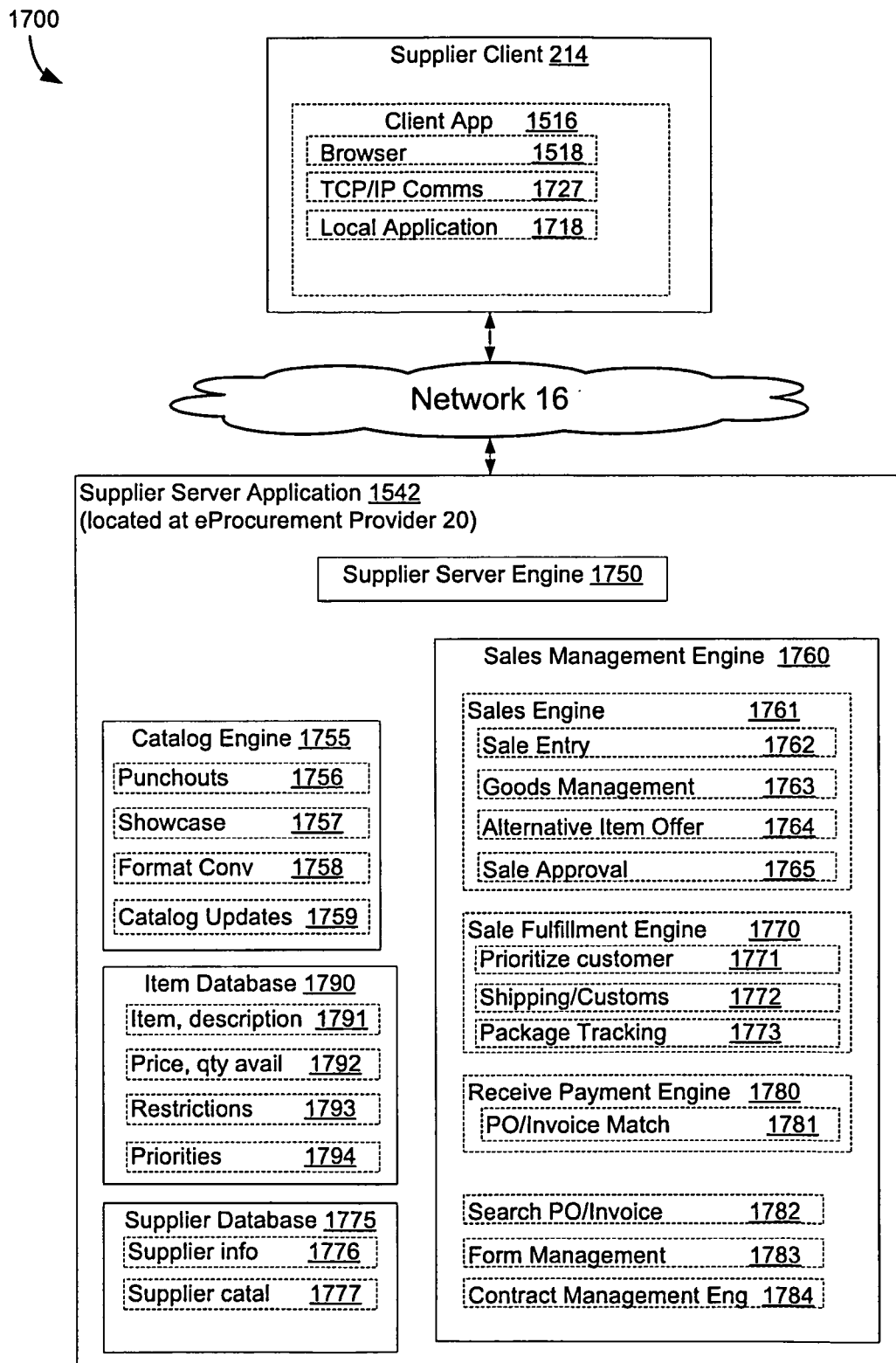


Figure 17

1800 →

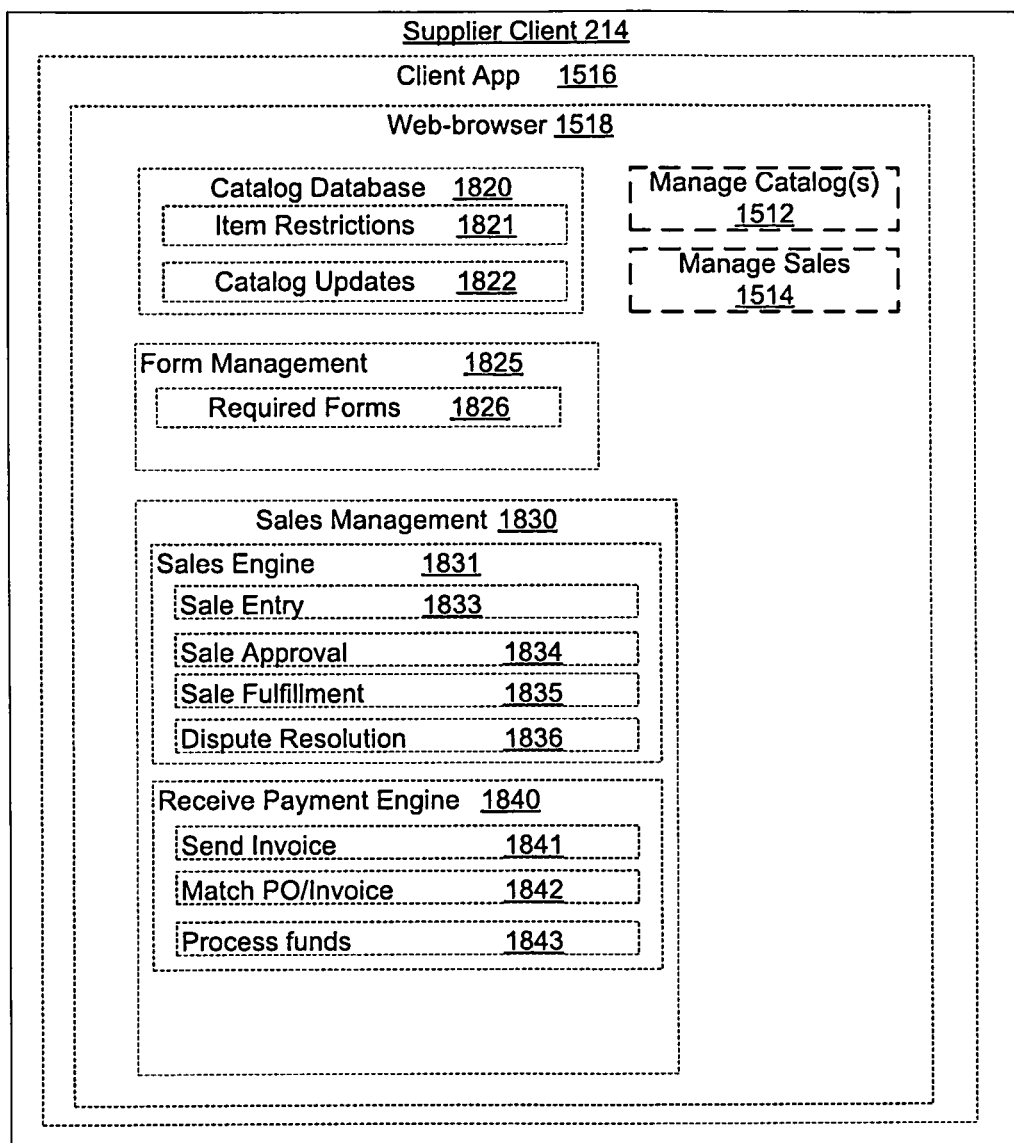


Figure 18

1900 →

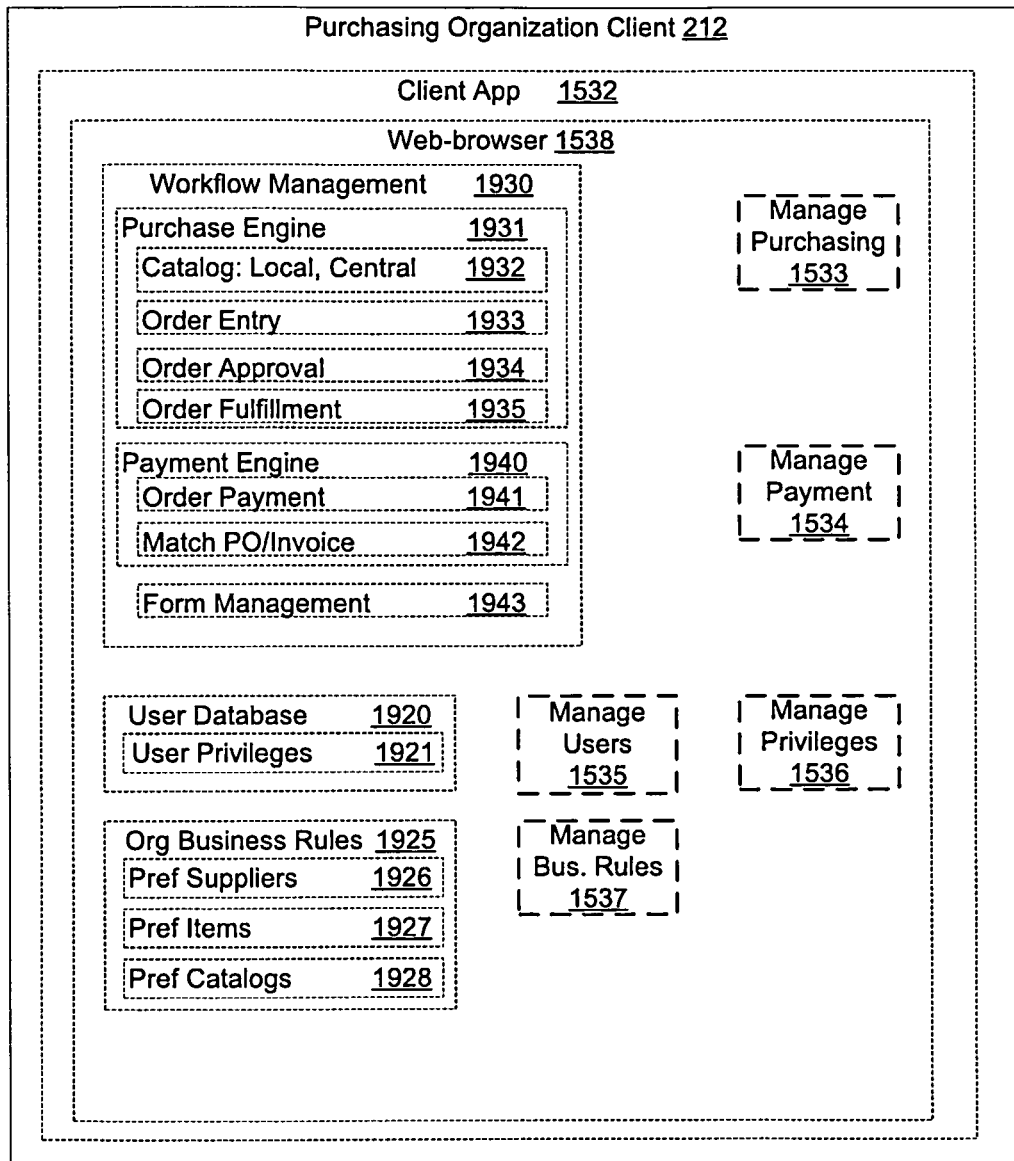


Figure 19

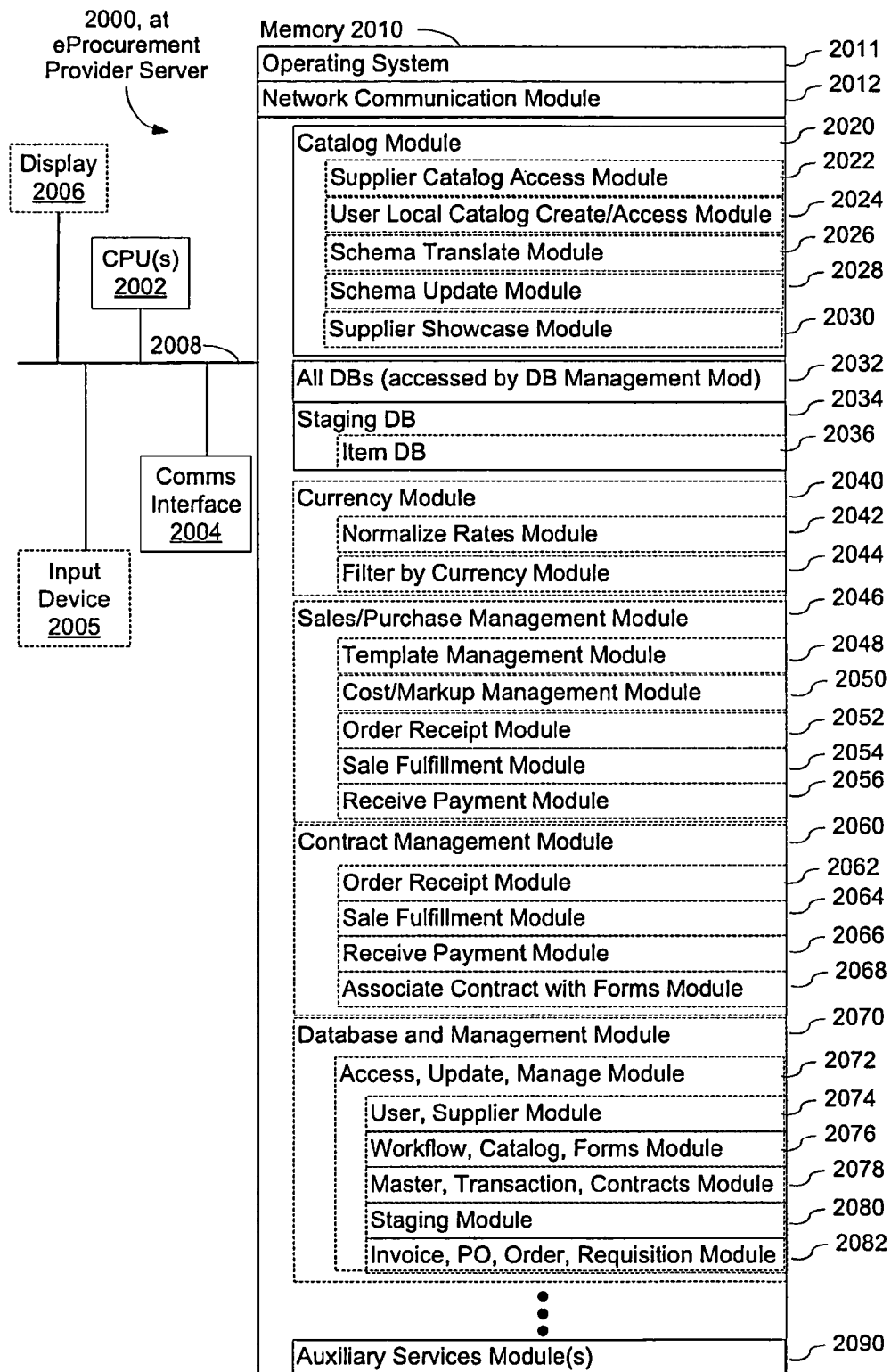


Figure 20

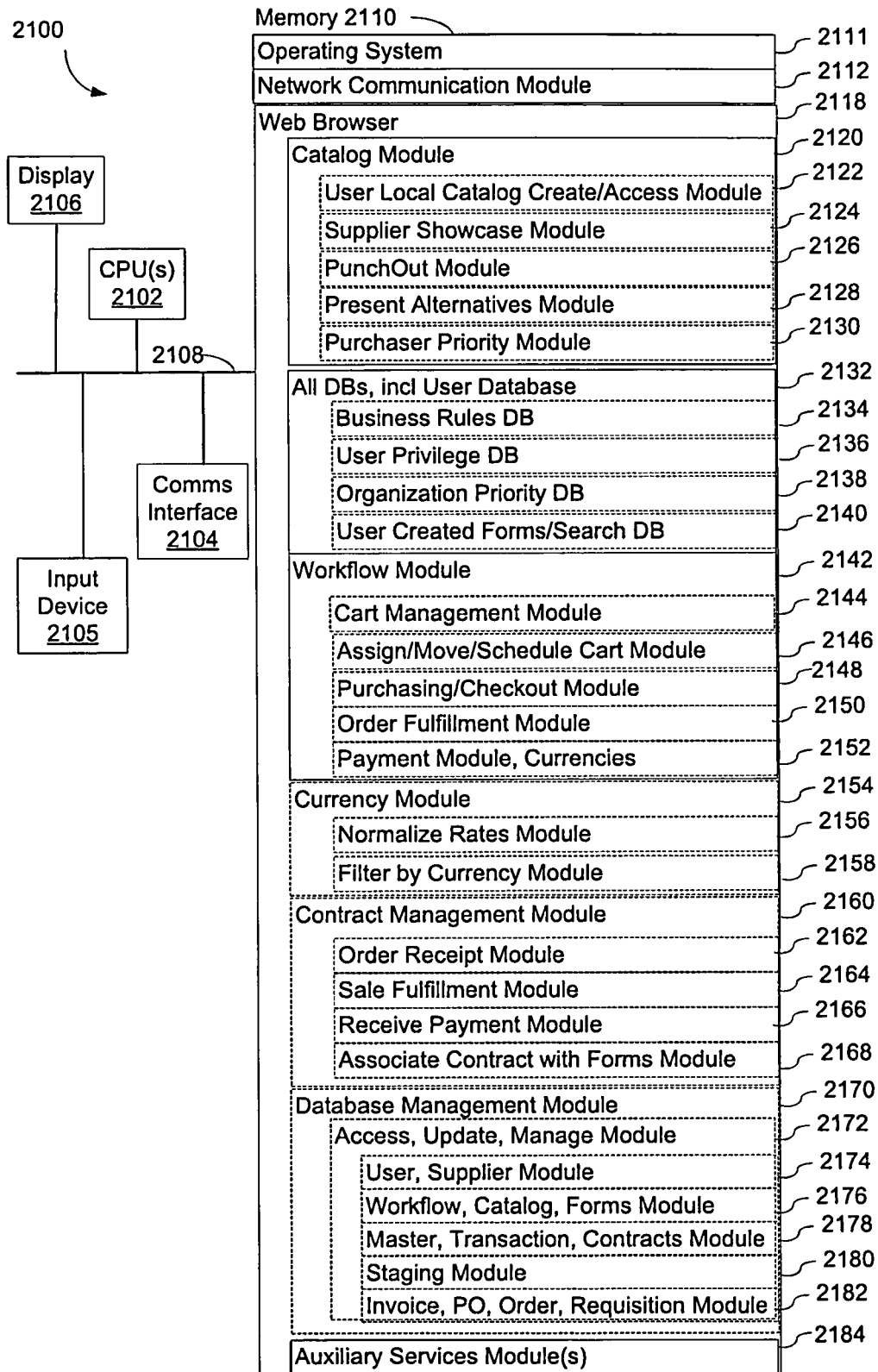


Figure 21

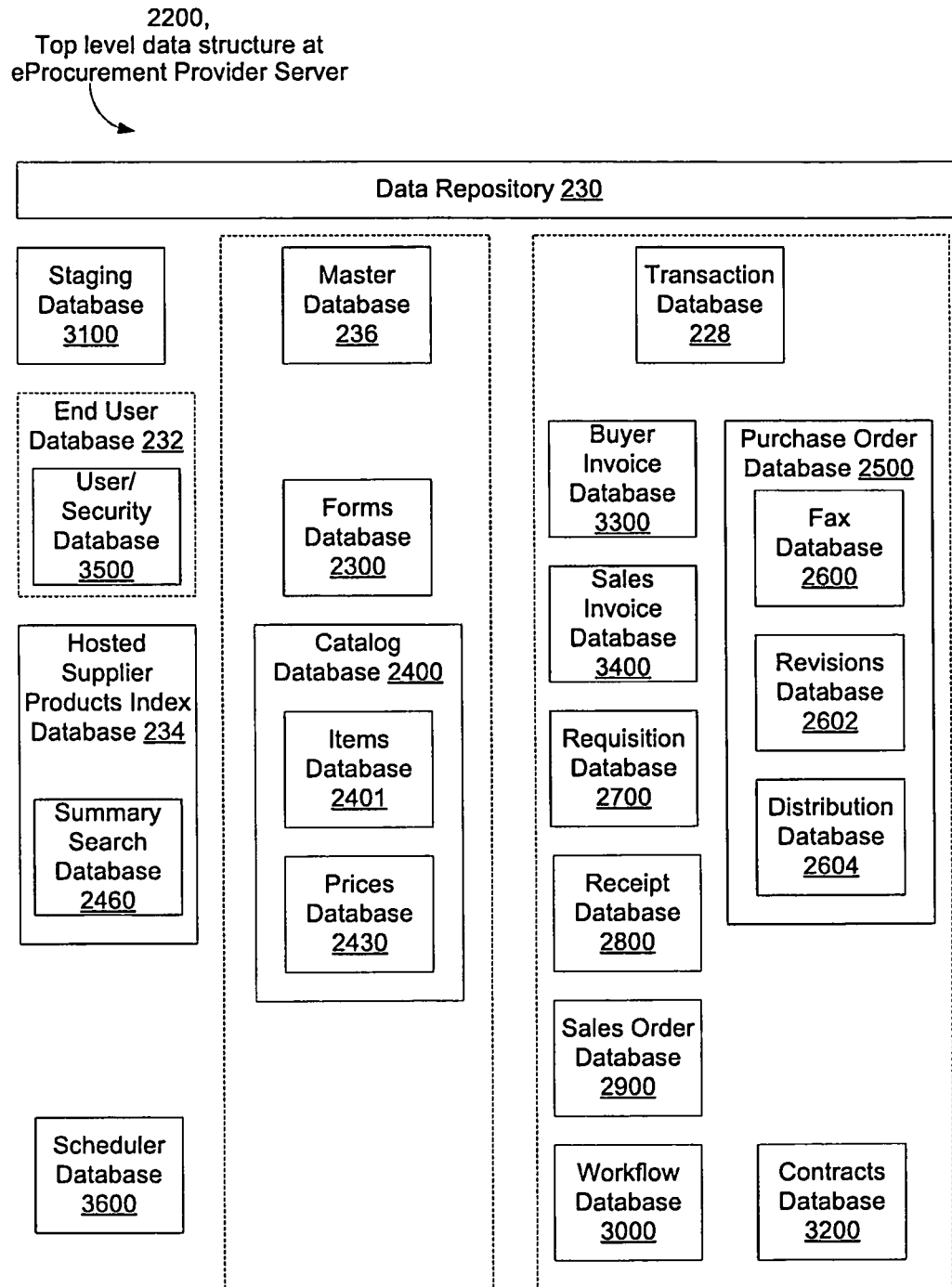


Figure 22

2300 →

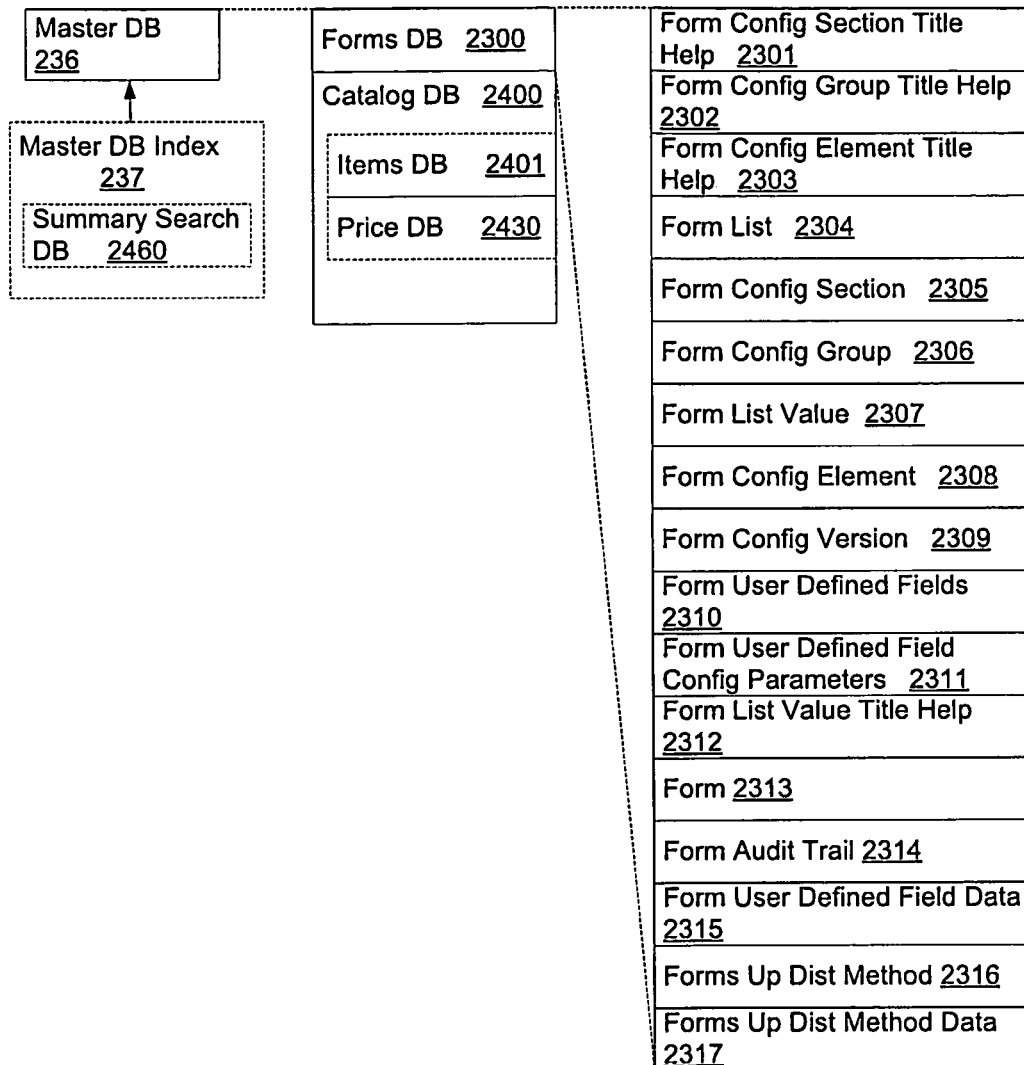


Figure 23



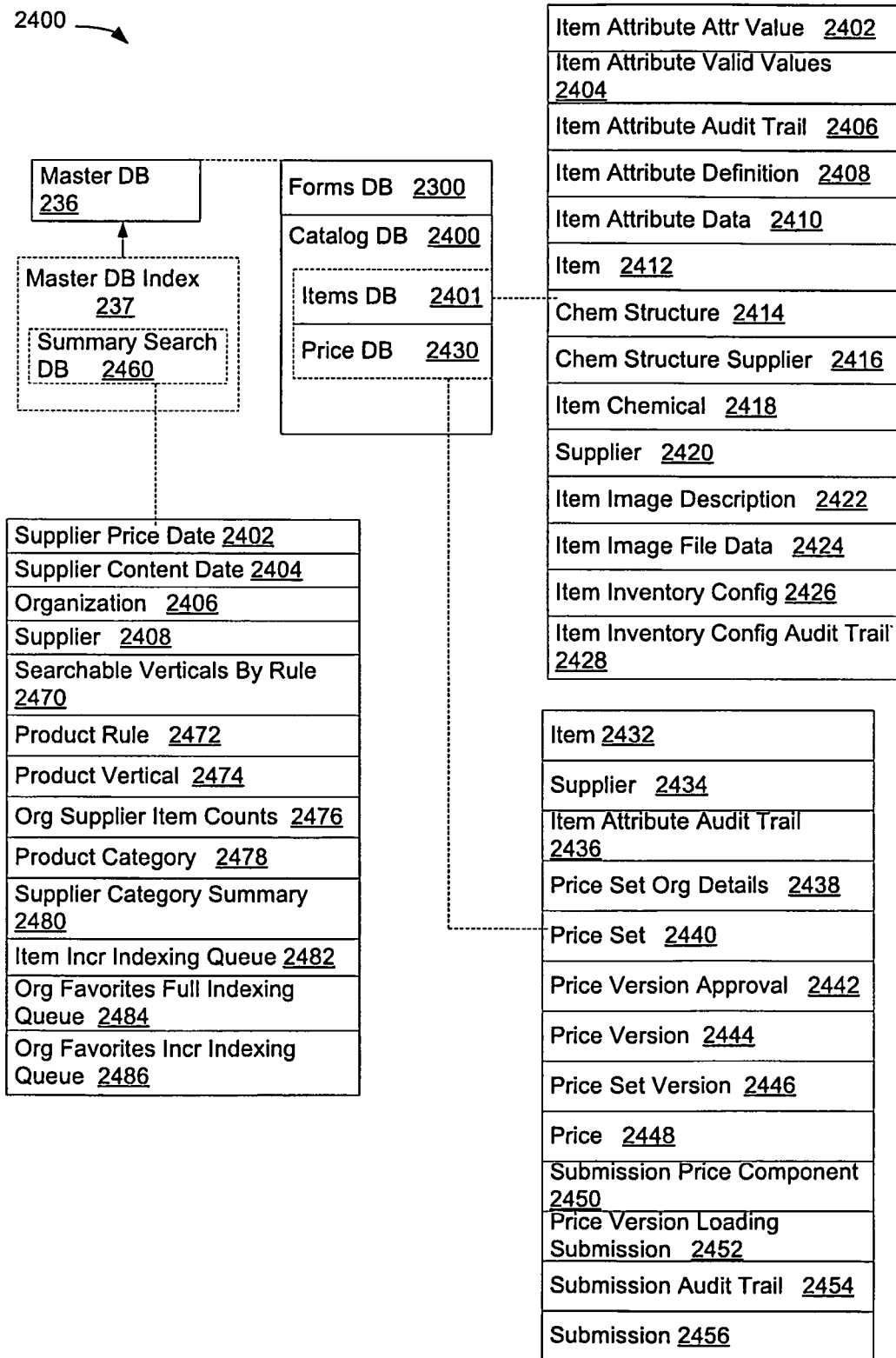


Figure 24

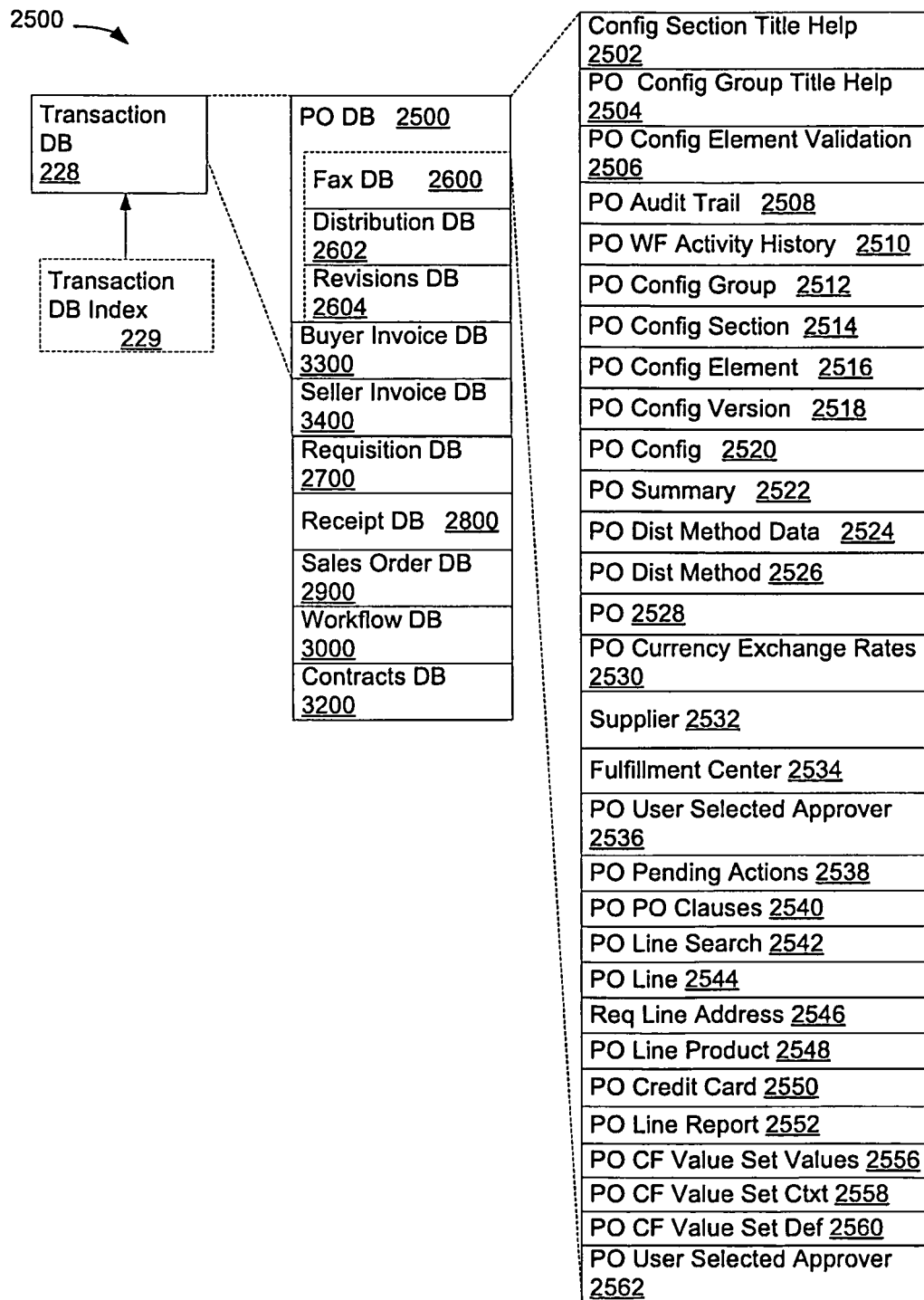


Figure 25

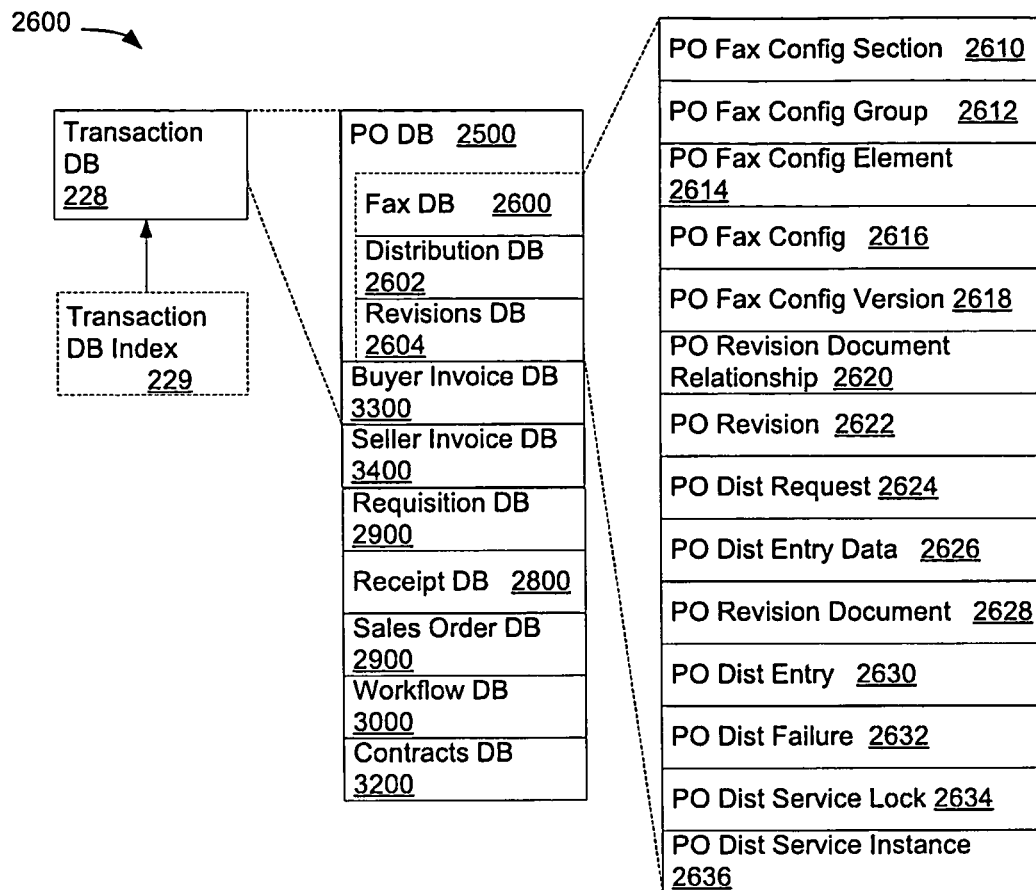


Figure 26

2700

Transaction  
DB  
228

Transaction  
DB Index  
229

PO DB <u>2500</u>
Fax DB <u>2600</u>
Distribution DB <u>2602</u>
Revisions DB <u>2604</u>
Buyer Invoice DB <u>3300</u>
Seller Invoice DB <u>3400</u>
Requisition DB <u>2700</u>
Receipt DB <u>2800</u>
Sales Order DB <u>2900</u>
Workflow DB <u>3000</u>
Contracts DB <u>3200</u>

Req Config Section Title Help <u>2702</u>
Req Config Group Title Help <u>2704</u>
Req Config Element Validation <u>2706</u>
Req Config Section <u>2708</u>
Req Config Group <u>2710</u>
Req Config Element <u>2712</u>
Req Config <u>2714</u>
Req Config Version <u>2716</u>
Req File Data <u>2718</u>
Req Currency Exchange Rates <u>2720</u>
Req Sup Dist Method Data <u>2722</u>
Req Sup Dist Method <u>2724</u>
Req WF Activity History <u>2726</u>
Req Audit Trail <u>2728</u>
Req Summary <u>2730</u>
Requisition <u>2732</u>
Req WF Activity Buffer <u>2734</u>
Req User Selected Approver <u>2736</u>
Supplier <u>2738</u>
Fulfillment Center <u>2740</u>
Req Supplier Group <u>2742</u>
Req Punchout Session <u>2744</u>
Req CF Value Set Def <u>2746</u>
Req CF Value Set Ctxt <u>2748</u>
Req CF Value Set Values <u>2750</u>
Contract <u>2752</u>
Req Line Address <u>2756</u>
Req Line Address Field <u>2758</u>
Req Line <u>2760</u>
Req Line Product <u>2762</u>
Req Credit Card <u>2764</u>
Req Line Report <u>2766</u>
Req Line Search <u>2768</u>
Req File Description <u>2770</u>

Figure 27

2800 →

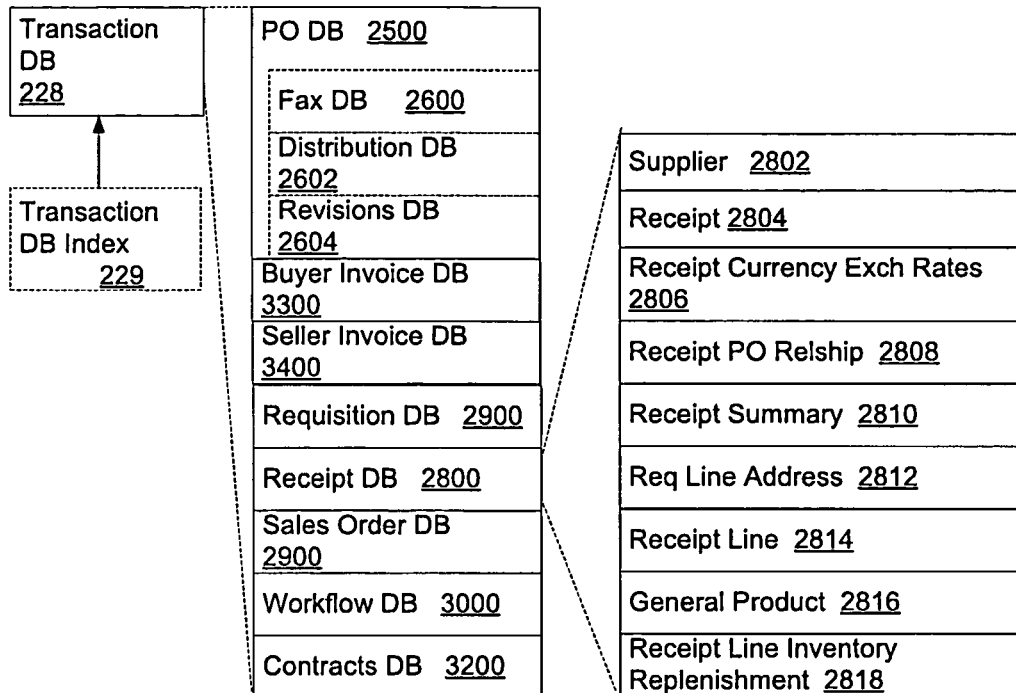


Figure 28

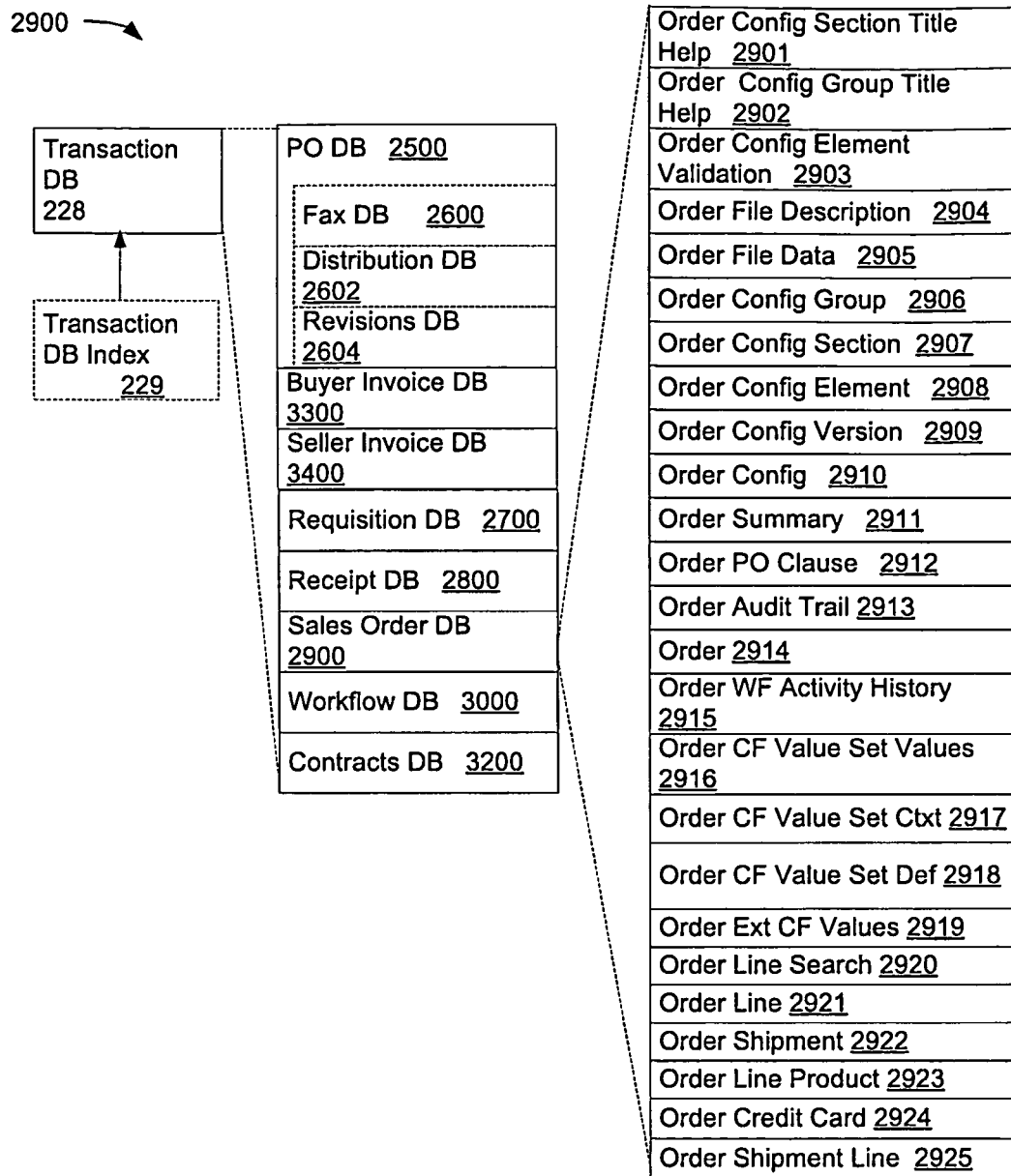


Figure 29

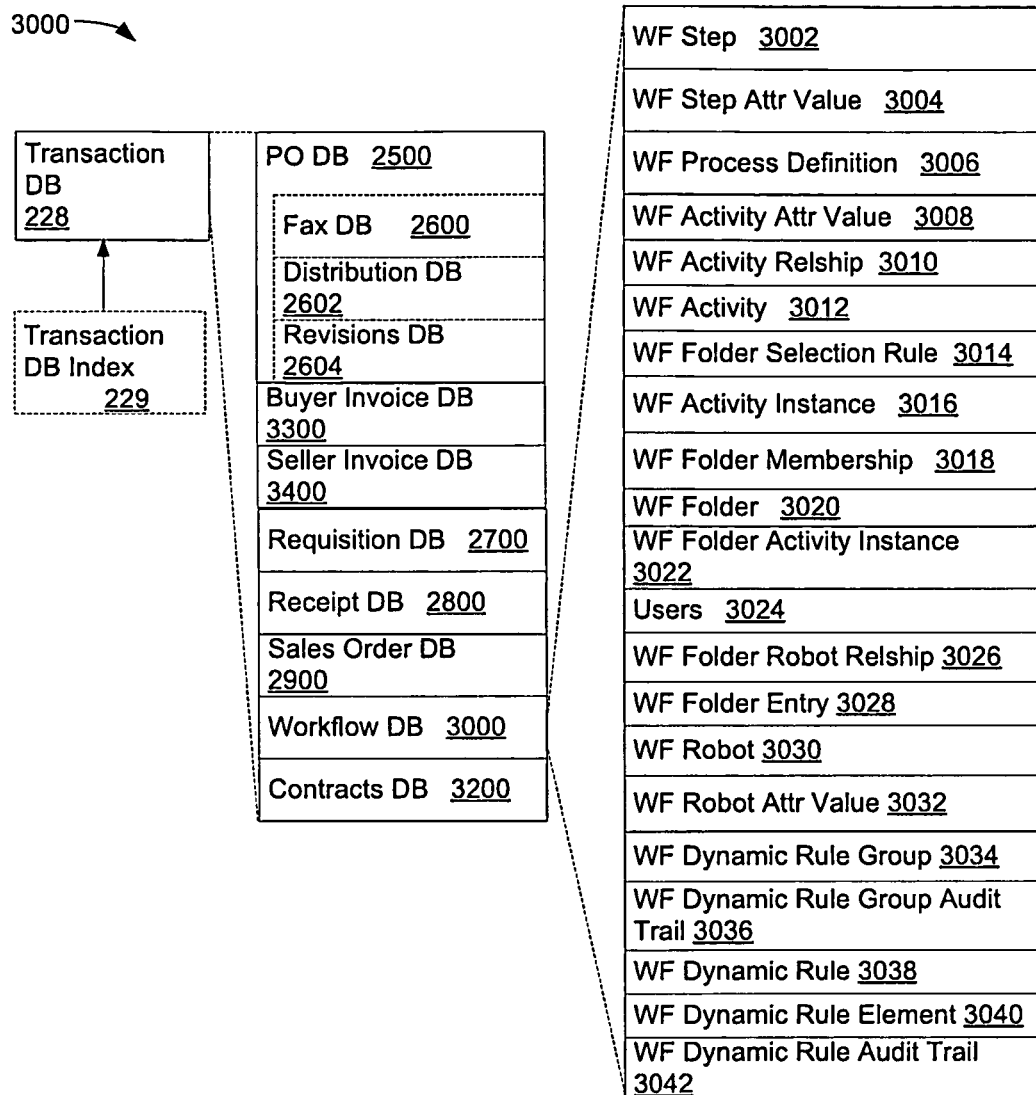


Figure 30

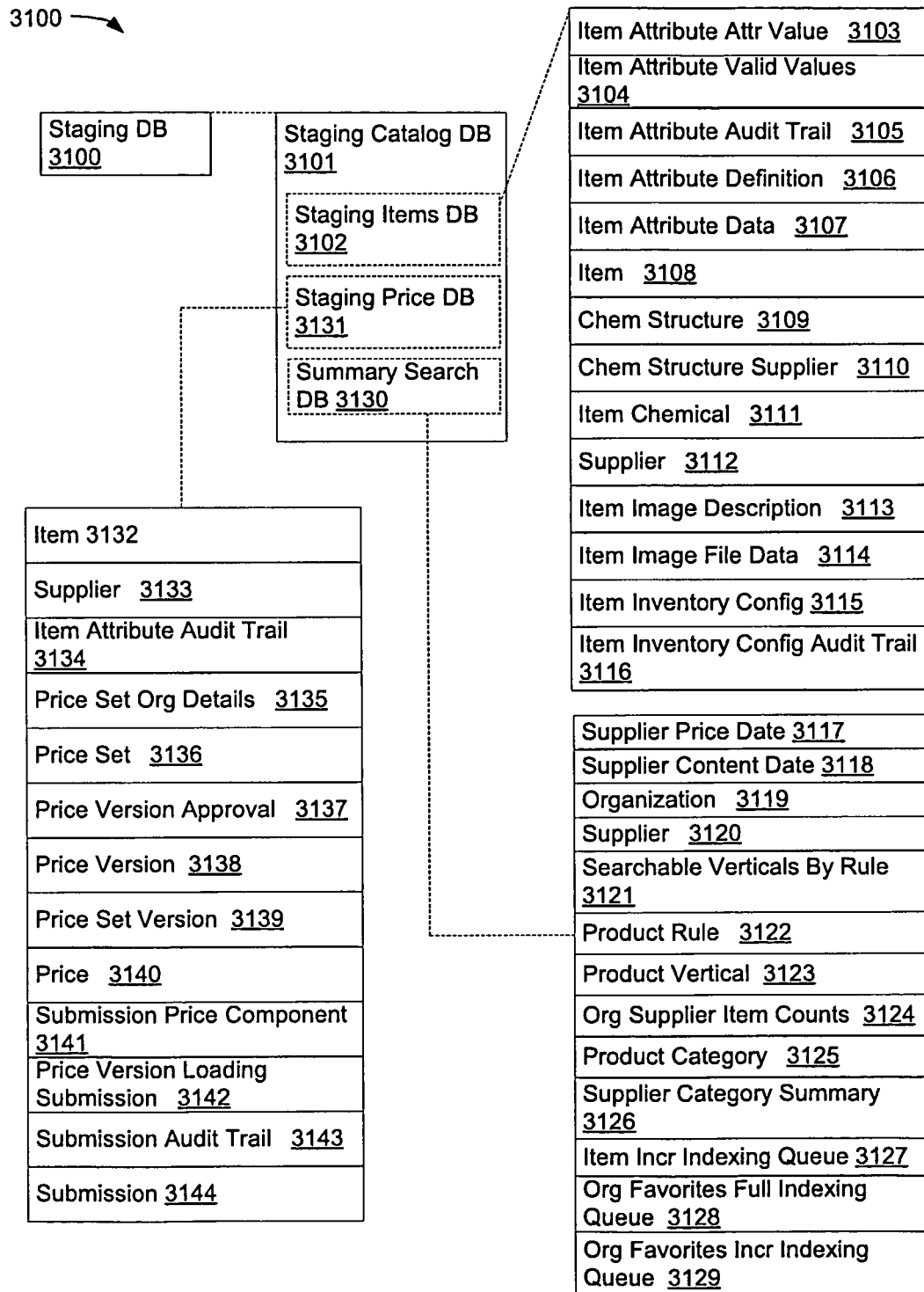


Figure 31



3200 →

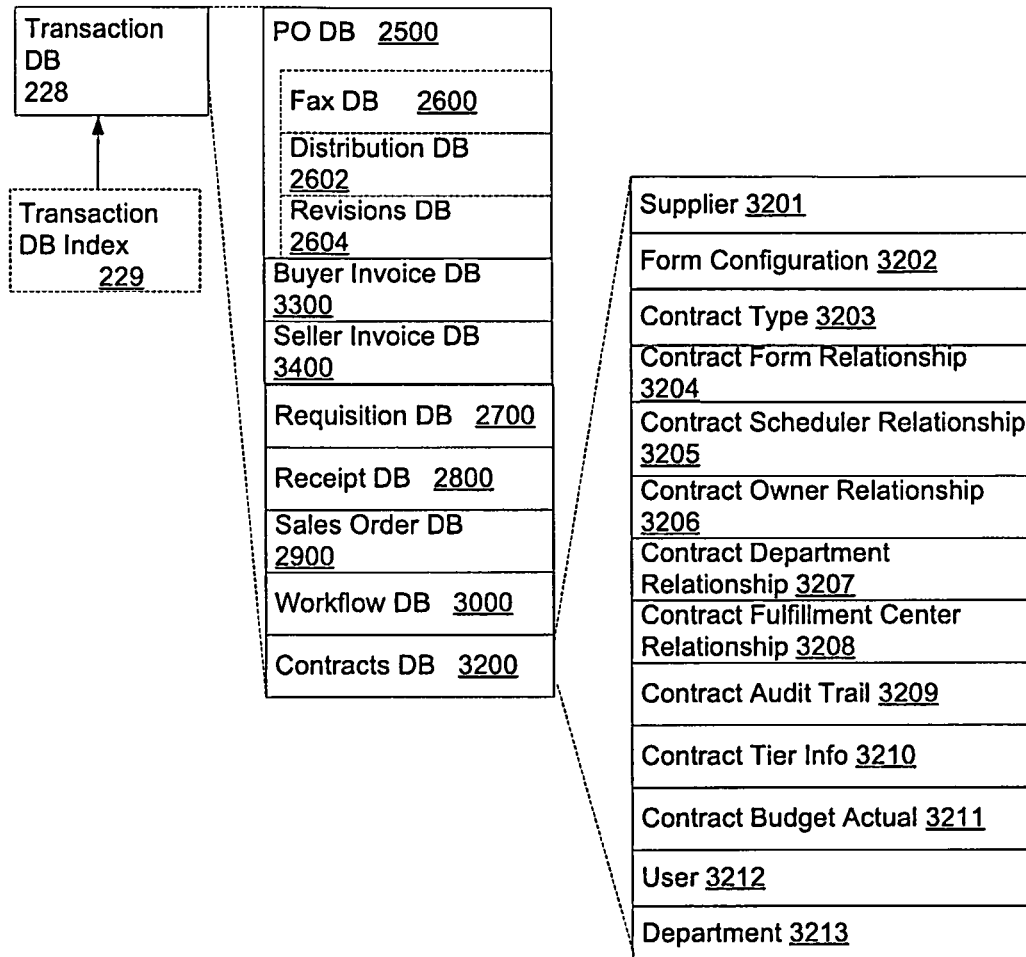


Figure 32

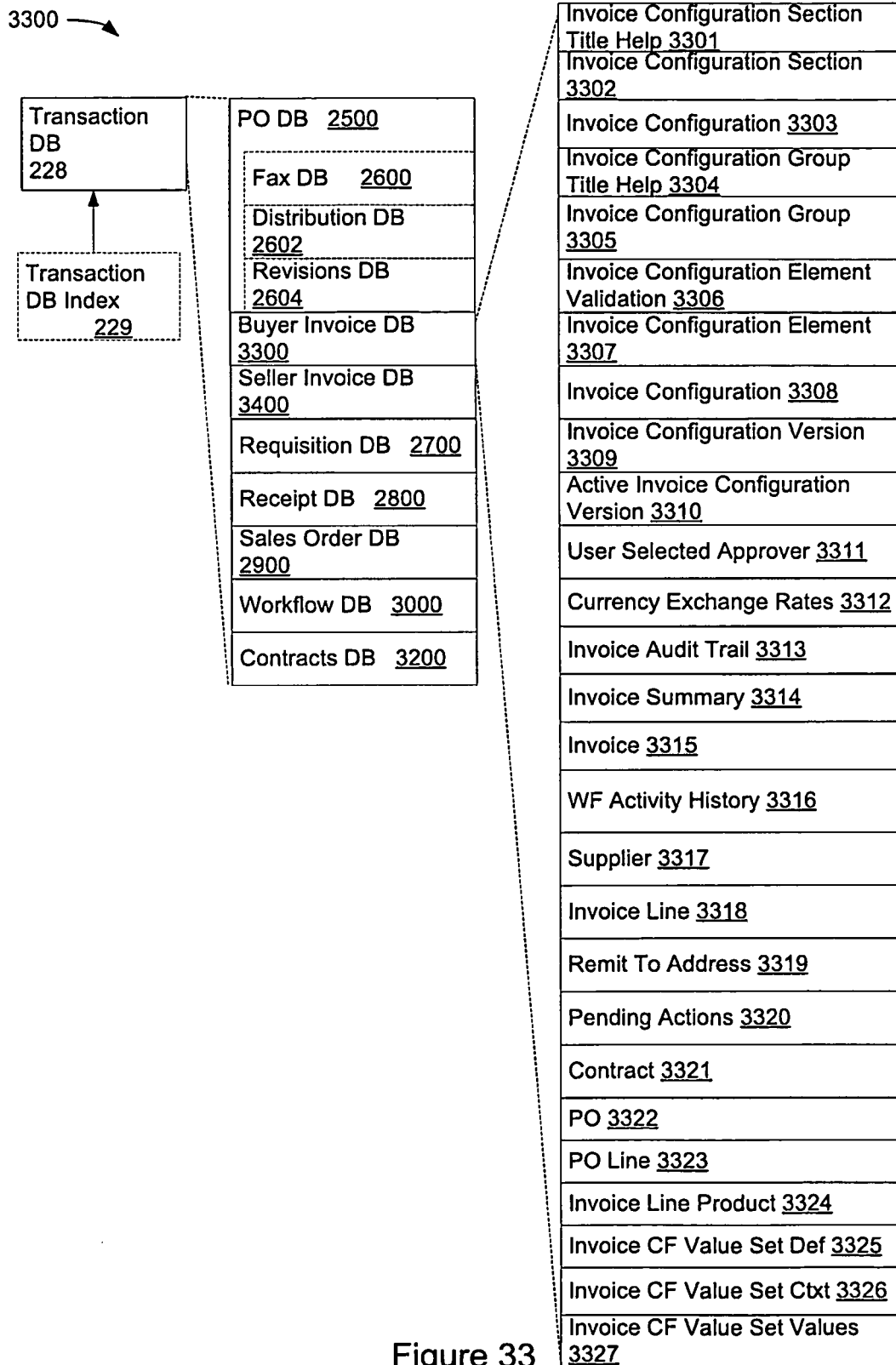


Figure 33

3400 →

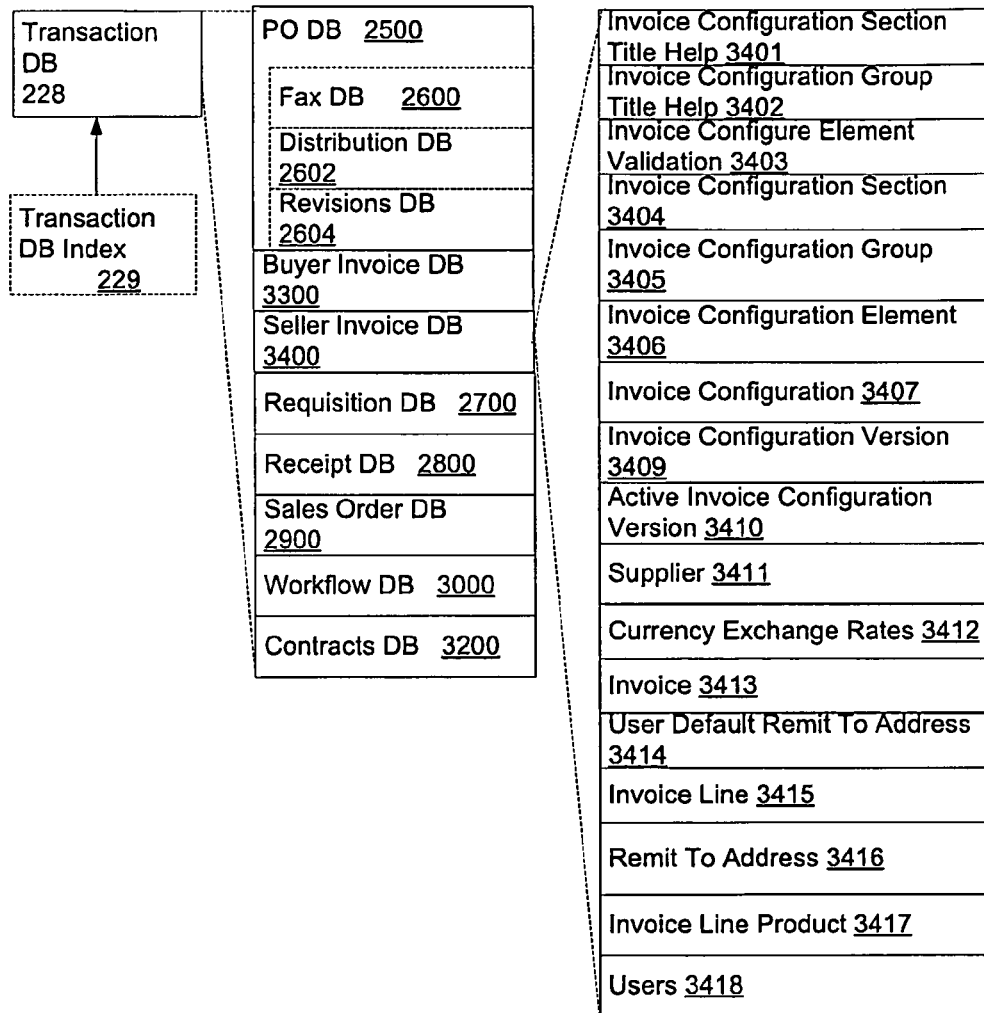


Figure 34

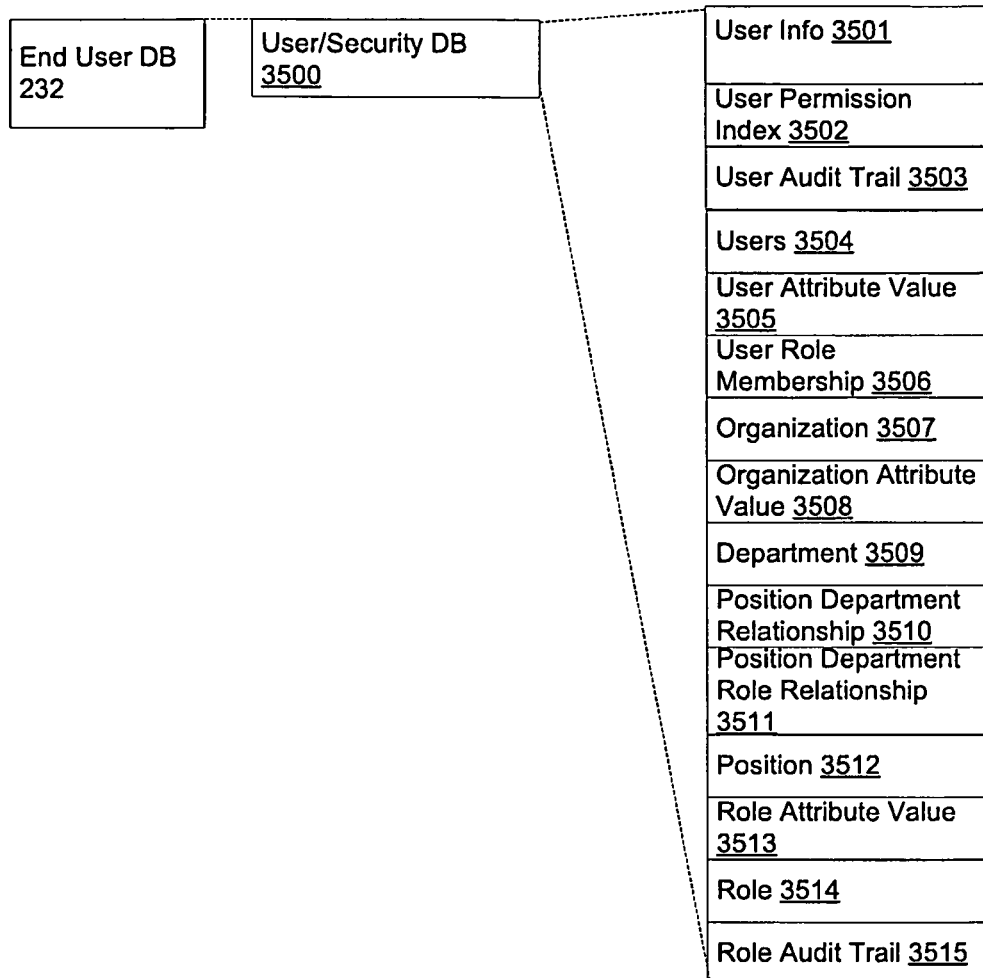

3500 

Figure 35

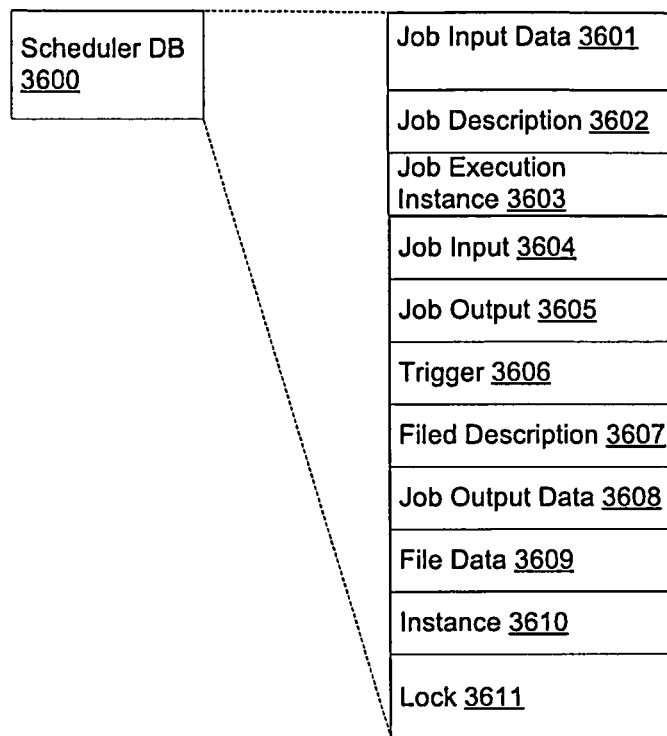

3600 

Figure 36

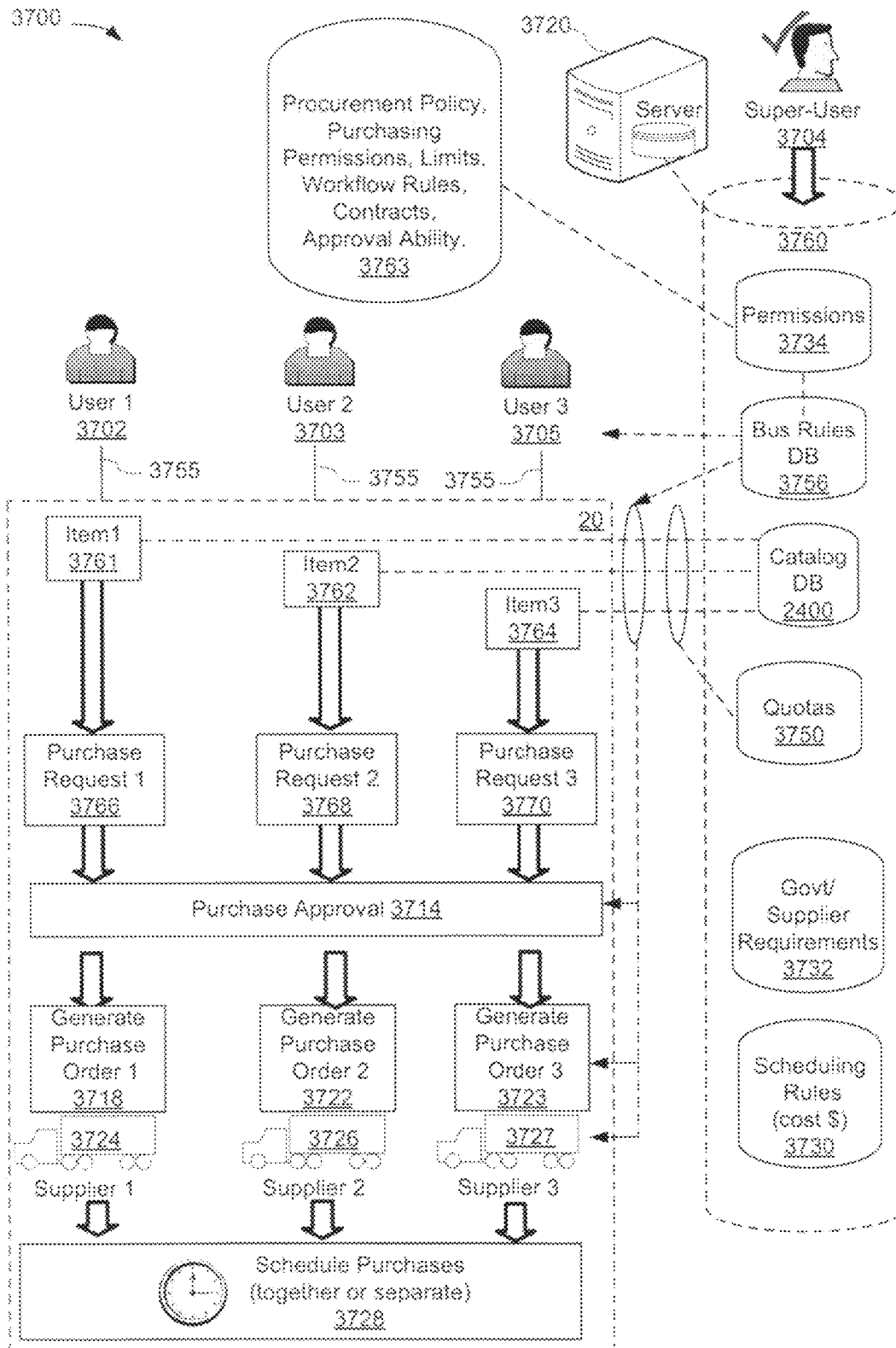


Figure 37

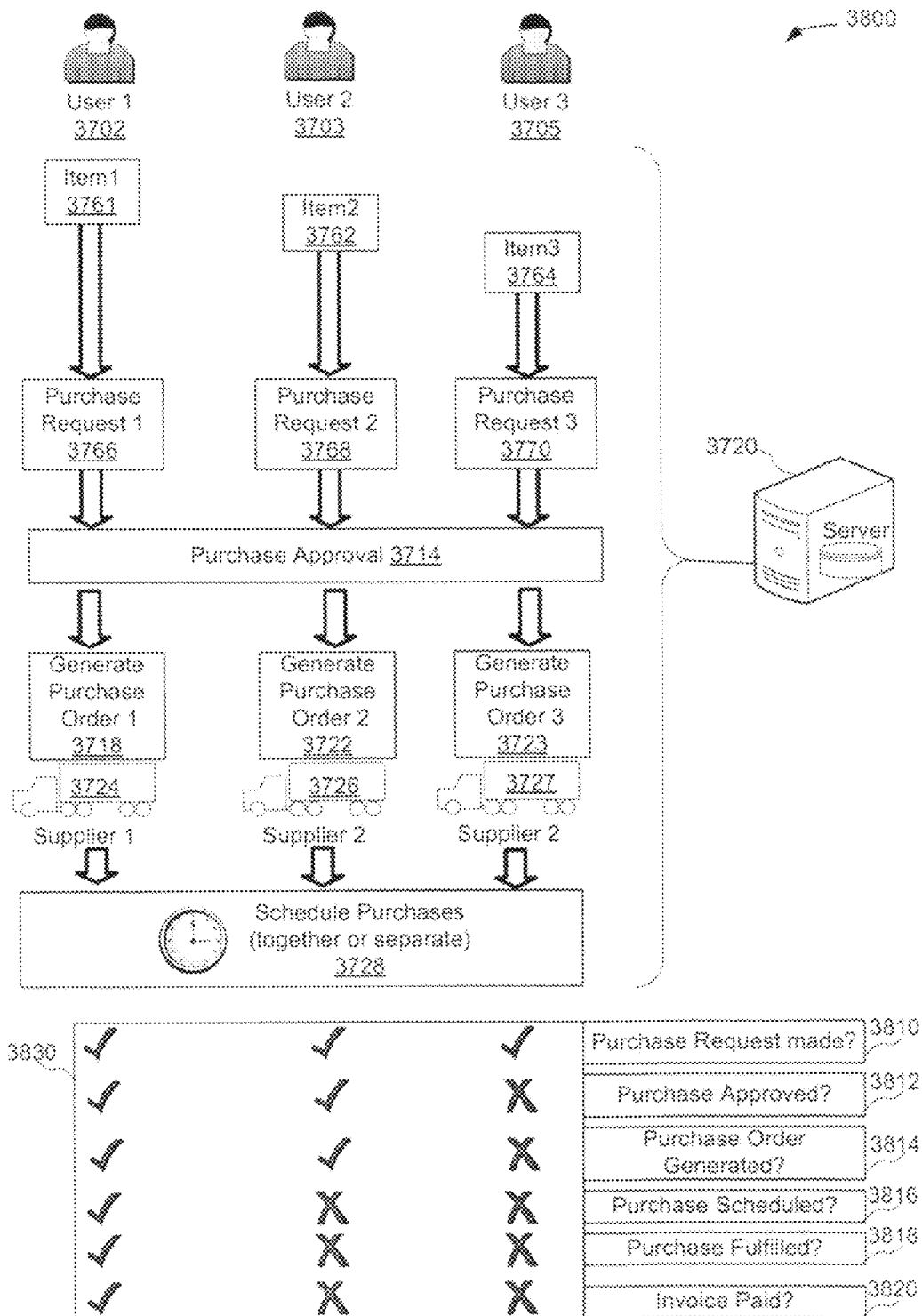
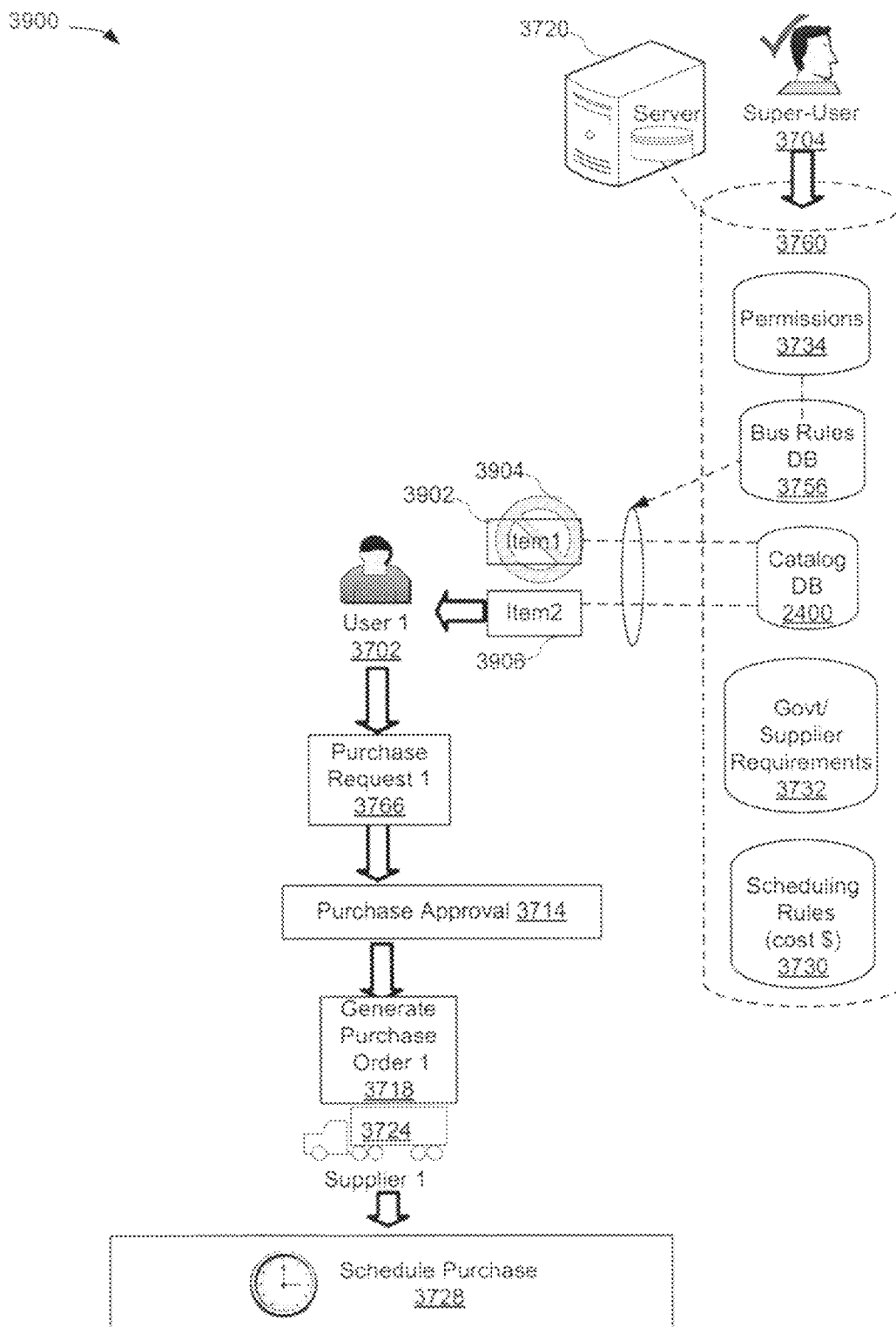


Figure 38





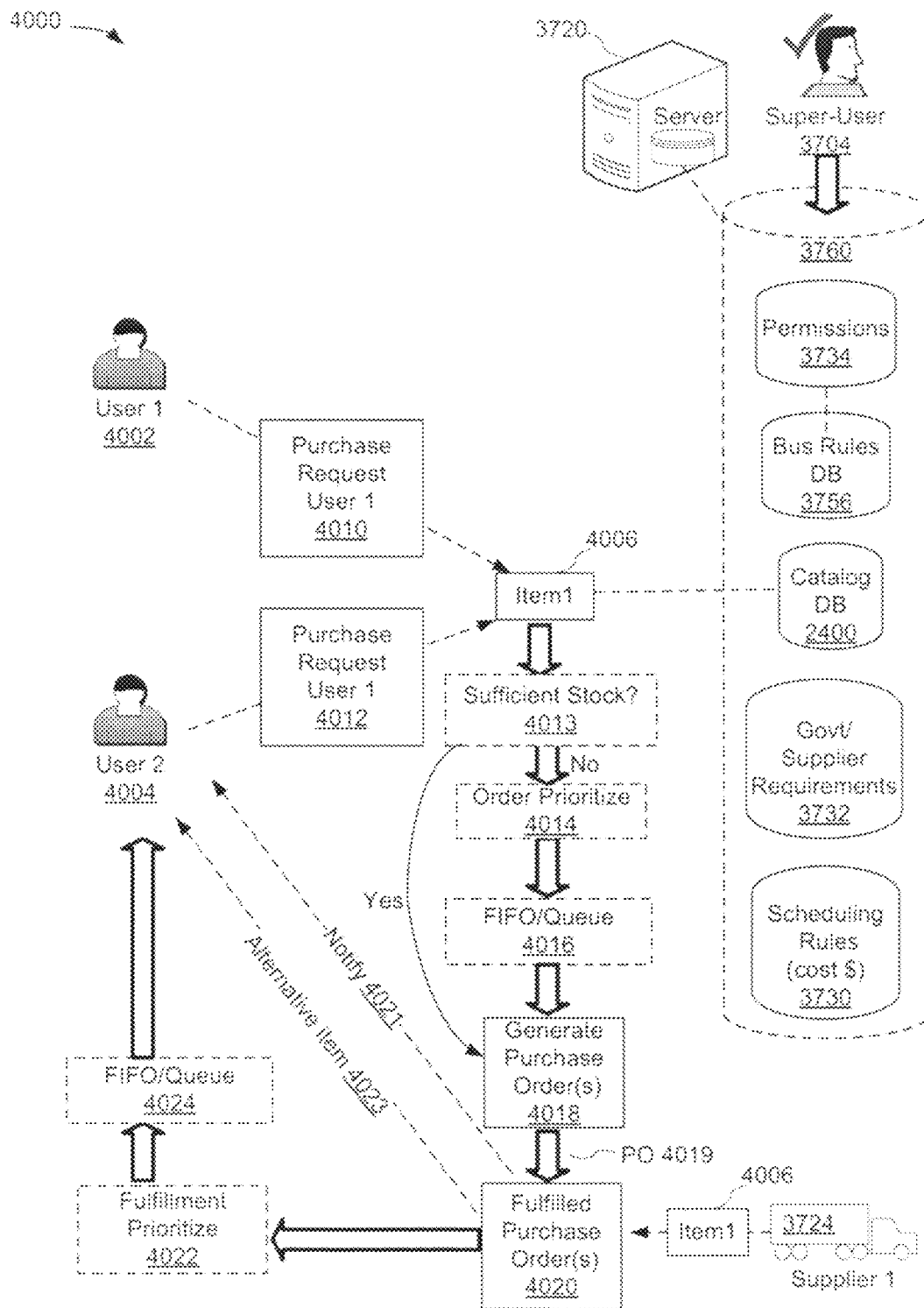


Figure 40

4100 →

		4118	4120	4122	4124
		Jan	Feb	Mar	Apr
4102	Purchase Price				
4104	Purchase Quantity				
4106	Date				
4108	Average Cost				
4110	Shelf Age				
4112	Markup				
4114	Sale Price				
4116	Inventory				

Figure 41

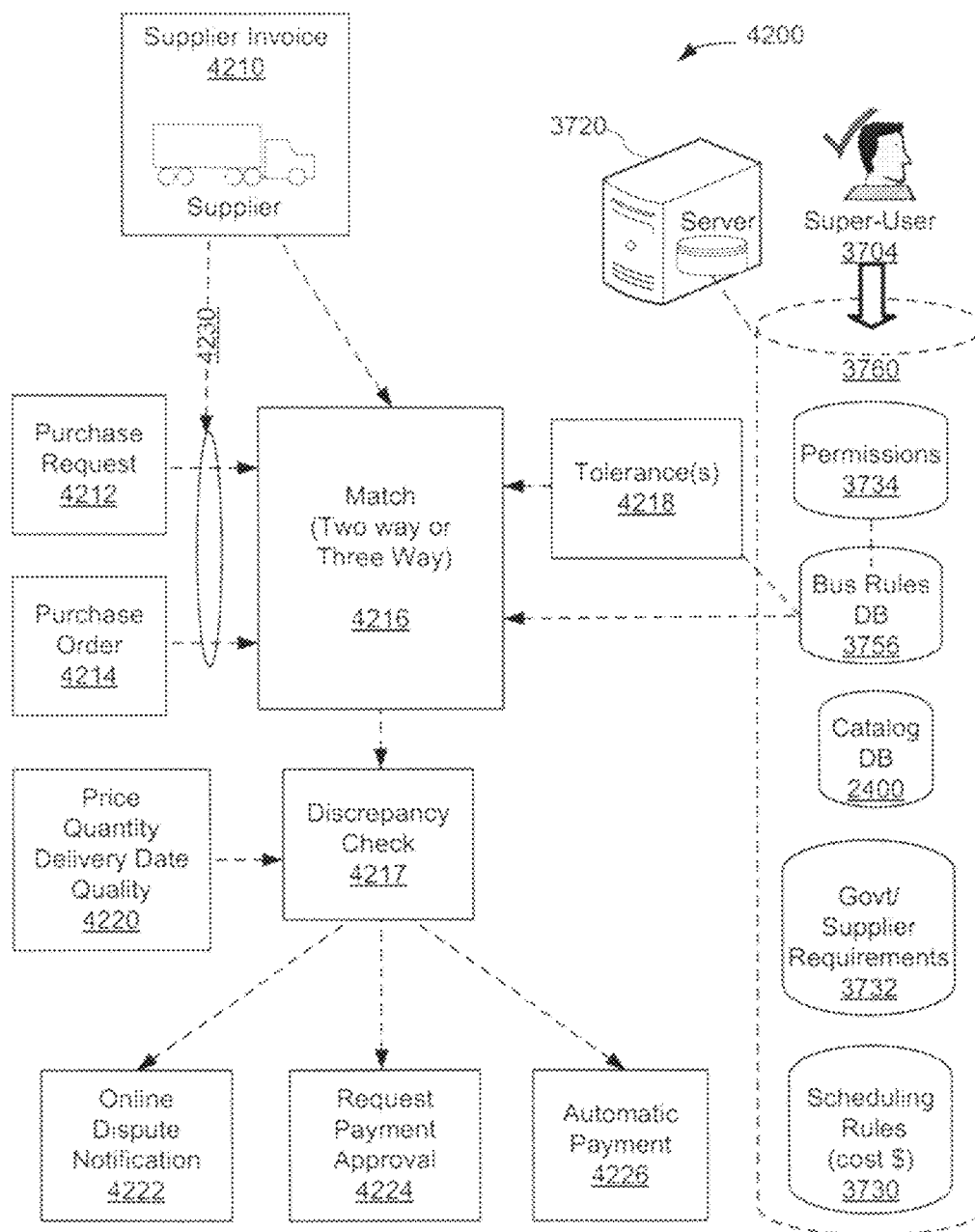


Figure 42

4300

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SHARED WORKFLOW FOLDERS | WORKFLOW CONFIG | WORKFLOW FOLDER IMPORT/EXPORT | ADVANCED DYNAMIC WORKFLOW ?

[IMPORT] [EXPORT]

ACTIVE VERSION: 15

15 RAM LIMITS NOW TRIGGER WF, PROJECT CODE VALIDATED AS REQUIRED

14 MERGE OF PRE-POST 5.0 WF

13 UPDATED #13

12 RAM LIMITS NOW TRIGGER WF

11 ADDED HELP FOR CONSOLIDATION

10 FISHER ADDED FOR CONSOLIDATION

9 NEW WITH PRWF AND POWF

8 CHUCK MODIFIED HELP

7 ADDED MISSING HELP

6 3.2C - CREATE PO, AUTO-REJECT, HELP, ICONS

PROCESS ID 1002305

VERSION 15

CODE VERSION 1

DESCRIPTION 4330 RAM LIMITS NOW TRIGGER

ACTIVE

4320 [SAVE]

4345

STEPS

NAME	HELP TEXT
FINANCIAL APPROVAL	YOUR REQUISITION REQUIRES FINANCIAL APPROVAL. SELECT AN APP
BUDGET NOTIFICATIONS	THE ACCOUNT CODE YOU ARE CHARGING TO HAS EXCEEDED ITS BUD
DEPARTMENT	YOUR DEPARTMENT REQUIRES REVIEW OF YOUR REQUISITION.
DYNAMIC DEPARTMENT	YOUR DEPARTMENT REQUIRES REVIEW OF YOUR REQUISITION.
COST CENTER	THE COST CENTER YOU ARE USING REQUIRES REVIEW AND APPROV
ACCOUNT CODE	THE ACCOUNT CODE YOU ARE USING REQUIRES REVIEW AND APPROV
RAM REVIEW	YOU PURCHASE WILL CREATE A SITUATION WHERE RADIOACTIVE LIC
RAD	YOUR REQUISITION REQUIRES REVIEW AND APPROVAL BY THE RSO.
EH&S	EH&S WILL BE NOTIFIED THAT YOU ARE PURCHASING HAZARDOUS OF
NON-CATALOG	NON-CATALOG ITEMS REQUIRE REVIEW BY PURCHASING TO ENSURE
CAPITAL EXPENSE	
SUPPLIER	
COMPUTER PRODUCTS	
EXPEDITE	
AUTO REJECT	

FIG. 43

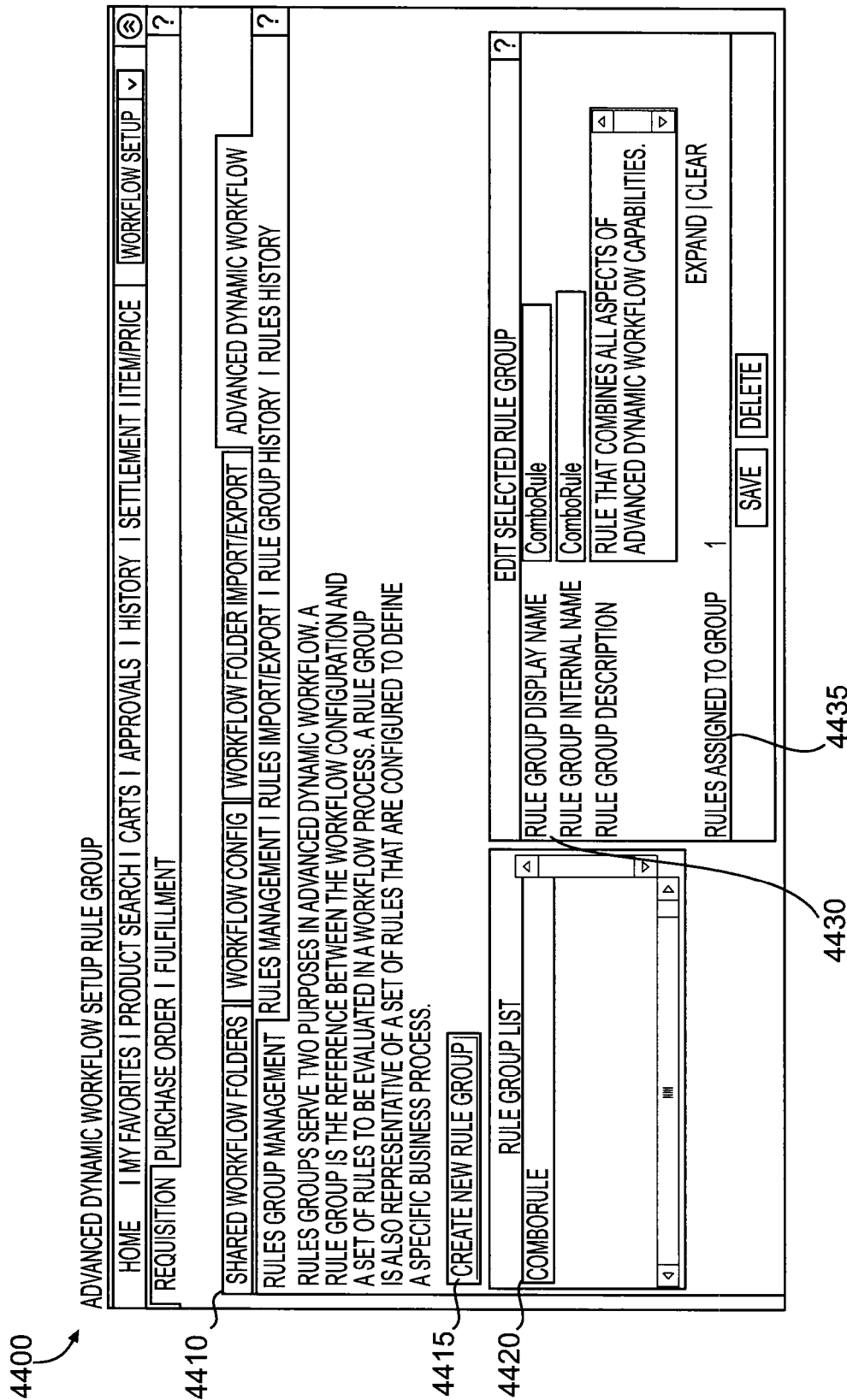


FIG. 44

4500 SETUP RULE

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | ITEM/PRICE | WORKFLOW SETUP

REQUISITION | PURCHASE ORDER | FULFILLMENT

4510 SHARED WORKFLOW FOLDERS | WORKFLOW CONFIG | WORKFLOW FOLDER IMPORT/EXPORT | ADVANCED DYNAMIC WORKFLOW

RULES GROUP MANAGEMENT | RULES MANAGEMENT | RULES IMPORT/EXPORT | RULE GROUP HISTORY | RULES HISTORY

<<RETURN TO SEARCH RESULT PAGE EDITING RULE: LARGE DEPARTMENT

4515

RULE INFO

INTERNAL NAME LARGE DEPARTMENT ACCOUNT

DISPLAY NAME LARGE DEPARTMENT

RULE GROUP COMBORULE

RULE DESCRIPTION THIS RULE COMBINES AMOUNT, DEPARTMENT AND A SPECIFIC ACCOUNT CODE FOR ROUTING.

ACTIVE

APPROVERS

REMOVE SELECTED APPROVERS

APPROVERS SELECT

JOHN APPROVER

ADD ANOTHER APPROVER...

4517

4520 DOCUMENT-LEVEL RULES

ADD A NEW RULE FOR A SPEND TOTAL AGAINST A SINGLE CUSTOM FIELD VALUE, GO

DOCUMENT TOTAL AMOUNT: GREATER THAN OR EQUAL TO 10000.00 USD EDIT | REMOVE

DEPARTMENT: ONE OF {"MATH", "MICROBIOLOGY", "OPERATING ROOM", "PEDIATRIC RESEARCH"} EDIT | REMOVE

4530 LINE-LEVEL RULES

ADD A NEW RULE FOR A LINE TOTAL AMOUNT GO

SINGLE CUSTOM FIELD VALUE OR RANGE: ACCOUNT (CC)(COST CENTER) EQUAL TO "0104987" EDIT | REMOVE

4525

4535

**FIG. 45**

4600 ASSIGN RULE TO GROUP

4610

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | ITEM/PRICE | WORKFLOW SETUP | ?

REQUISITION | PURCHASE ORDER | FULFILLMENT | ?

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4700 IMPORT/EXPORT RULES/GROUPS

HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | ITEM/PRICE | WORKFLOW SETUP | ?

REQUISITION | PURCHASE ORDER | FULFILLMENT

4710 SHARED WORKFLOW FOLDERS | WORKFLOW CONFIG | WORKFLOW FOLDER IMPORT/EXPORT | ADVANCED DYNAMIC WORKFLOW

4715 RULE GROUP MANAGEMENT | RULES MANAGEMENT | RULES IMPORT/EXPORT | RULE GROUP HISTORY | RULES HISTORY | ?

REQUEST ?

SELECT THE APPROPRIATE OPTION FROM THE ACTION DROPDOWN AND ENTER THE REQUIRED INFORMATION. FOR FURTHER INFORMATION, CLICK THE ADOBE IMAGE BELOW FOR THE IMPORT INSTRUCTIONS. FOR AN INPUT FILE TEMPLATE, CLICK THE DYNAMIC RULES/RULE GROUPS XML TEMPLATE.

ACTION: 4720 EXPORT

DESCRIPTION:

4730

EXPAND | CLEAR

SUBMIT

CLICK THE ADOBE ICON FOR IMPORT INSTRUCTIONS

DYNAMIC RULES/RULE GROUPS CLICK TO DOWNLOAD... XML TEMPLATE

RECENT ACTIVITY ?

TO SEE THE LATEST STATUS OF THE LAST FIVE (5) REQUESTS SUBMITTED, CLICK REFRESH. IF THE SUBMITTED REQUEST IS NOT VISIBLE, VIEW ALL SUBMITTED REQUESTS BY CLICKING THE CLICK HERE FOR ADDITIONAL REQUESTS LINK. TO VIEW THE OUTPUT FILE FOR A COMPLETED REQUEST, CLICK THE FILE NAME OR THE CLICK TO IMPORT LINK SO THE FILE CAN BE VIEWED OR SAVED.

☒ NO MATCHING RECORDS FOUND.

CLICK HERE FOR ADDITIONAL REQUESTS...

REFRESH

4725

FIG. 47



4800 SUPPLIES MANAGER ITEM SETUP-MAIN ATTRIBUTES

SWI21101 ELECTRIC STAPLER, COMPACT, BLACK STOCKROOM (ACTIVE)

4810 BASIC | ADDITIONAL | CHEMICAL | ANTIBODY | PRICES | PHYSICAL INVENTORY | HISTORY

ATTRIBUTE	VALUE
PART NUMBER	SWI21101
PRODUCT DESCRIPTION	ELECTRIC STAPLER, COMPACT, BLACK
PACKAGING UOM	1/EA
PRODUCT SIZE	
COLOR	
STATUS	ACTIVE
UNSPSC	
CATEGORY	STAPLERS (VERTICALS: OFFICE COMPUTER)
SEARCHABLE KEYWORDS	SELECT CATEGORY
MANUFACTURER NAME	SWINGLINE
MANUFACTURER PART NUMBER	SWI21101
LONG DESCRIPTION	ELECTRIC STAPLER, COMPACT, BLACK
LEAD TIME	
UPC	

4880 [CREATE NEW ITEM] 4882 [COPY STANDARD DATA AS NEW]

ATTRIBUTE	VALUE
MORE INFORMATION URL	
IMAGE URL	
MSDS URL	
TECHNICAL DATA SHEET URL	
IS CONTROLLED SUBSTANCE?	<input type="checkbox"/> 4860
IS RECYCLED?	<input type="checkbox"/> 4862
IS HAZARDOUS MATERIAL?	<input type="checkbox"/> 4864
IS RADIOACTIVE?	<input type="checkbox"/> 4866
IS MINOR RADIOACTIVE?	<input type="checkbox"/> 4868
IS SELECT AGENT?	<input type="checkbox"/> 4870
IS TOXIN?	<input type="checkbox"/> 4872
IMAGE	UPLOAD NEW IMAGE: <input type="text"/> <input type="button" value="BROWSE..."/> 4874

FIG. 48

ITEM SETUP - INVENTORY ATTRIBUTES  
SW21101 ELECTRIC STAPLER, COMPACT, BLACK STOCKROOM (ACTIVE)

☒
☒
☒
☒
☐

MINIMUM INVENTORY LEVEL  
 MAXIMUM INVENTORY LEVEL  
 REORDER POINT  
 ECONOMIC ORDER QUANTITY  
 CYCLE COUNT INTERVAL

4940 ~ DEFAULT VALUES  
 OVERRIDE

FIG. 49A

ITEM SETUP - PRICING  
SWI21101 ELECTRIC STAPLER, COMPACT, BLACK STOCKROOM (ACTIVE)

BASIC

ADDITIONAL

CHEMICAL

ANTIBODY

PRICES

PHYSICAL INVENTORY

HISTORY

PHYSICAL INVENTORY DETAILS

INVENTORY / FC CONFIGURATION

REPLENISHMENT LINK CONFIGURATION

?

CREATE NEW ITEM

COPY STANDARD DATA AS NEW

INVENTORY PARAMETERS

INVENTORY PRICING SETUP

PREFERRED REPLENISHMENT LINK

?

PRICING MODEL ~ 4960

MARKUP% ~ 4962

FIFO

20

4964

4966 ~ DEFAULT VALUES

☒

☒

SAVE

4968

FULFILLMENT ADDRESS

DEFAULT SETTINGS FOR THIS SUPPLIER

FULFILLMENT ADDRESS 1

4950

FIG. 49B

ITEM SETUP - REPLENISHMENT LINK  
SWI21101 ELECTRIC STAPLER, COMPACT, BLACK STOCKROOM (ACTIVE)

BASIC | ADDITIONAL | CHEMICAL | ANTIBODY | PRICES | PHYSICAL INVENTORY | HISTORY

PHYSICAL INVENTORY DETAILS | INVENTORY / FC CONFIGURATION | REPLENISHMENT LINK CONFIGURATION

CREATE NEW ITEM

COPY STANDARD DATA AS NEW

FULFILLMENT ADDRESS

DEFAULT SETTINGS FOR THIS SUPPLIER

FULFILLMENT ADDRESS 1

INVENTORY PARAMETERS	INVENTORY PRICING SETUP	PREFERRED REPLENISHMENT LINK
REPLENISH LINKS INHERITED FROM THE DEFAULT FULFILLMENT CENTER		
PREFER-RED	SUPPLIER	ITEM NAME
<input checked="" type="radio"/>	CORPORATE EXPRESS	COMPACT ELECTRIC STAPLER, 12 SHEET, 3/8" THROAT DEPTH, HALF STRIP BLACK
<input type="radio"/>	CORPORATE BOSTON EXPRESS	BOSTON ELECTRIC STAPLER, 20 SHEET CAPACITY, BLACK
<input type="radio"/>	OFFICE DEPOT	SWINGLINE(R) ELECTRIC STAPLER, BLACK

SAVE

4982 4984 4986

4990 4992 4994 4996

4980

**FIG. 49C**

5000

SUPPLIER SETUP - INVENTORY PARAMETERS

SUPPLIER

STOCKROOM

5005

APPLY ALL CHANGES

SUMMARY

GENERAL

CONTACTS

CONTRACTS

FULFILLMENT ADDRESSES

REMITTANCE ADDRESS

ITEM PRICES

SUPPLIER CLASSES

INTEGRATIONS

CONSORTIUM SETUP

HISTORY

?

NEW ADDRESS

5020

5010

5040

ADDRESSES

DEFAULT SETTINGS FOR THIS SUPPLIER

FULFILLMENT ADDRESS 1

GENERAL

CONTACTS

ORDERING

ORDER DISTRIBUTION

PHYSICAL INVENTORY

HISTORY

CONFIGURATION

LOCATIONS

PRICES

KIOSK

?

FOR INSTOCK COLUMN SHOW

SHOW BACK ORDERED LINES ON PICKLIST

BY DEFAULT CLOSE ORDERS THAT ARE FULLY

ALLOCATED/CANCELLED AT THE TIME

OF SHIPMENT

IN STOCK/OUT OF STOCK

5040

OVERWRITE

DEFAULT VALUES

OPEN ORDER PROCESSING

BACKORDER ESTIMATED SHIP DATE

SHIPMENT DELIVERY DAYS

USING PRICE TOLERANCE

FULFILLMENT PRICE TOLERANCE VALUES

AUTO ALLOCATE BACKORDERED

ITEMS AT RECEIVING

CYCLE COUNT INTERVAL (DAYS)

5050

5060

LEAVE IN PERSONAL FOLDER

CALCULATE USING ITEM LEAD TIME

5

X

%

OR

USD

30

30

SAVE

**FIG. 50**

5100

5112

5110

SEARCH RESULTS

RESULTS FOR: +BLACK +ELECTRIC +STAPLER

SHOW PRODUCT DETAILS

ADD TO ACTIVE CART

GO

LEGEND ?

PRODUCTS PER PAGE 20

4 PAGE 1 OF 3

WEIGHT	SUPPLIER	CATEGORY	CATALOG#	PRODUCT DESCRIPTION	UOM	PRODUCT SIZE	PRICE	QUANTITY	ADD TO SELECT CART
100	STOCK- ROOM	STAPLERS	SWI21101	ELECTRIC STAPLER, COMPACT, BLACK	1/EA		14.40 USD	1	<input type="checkbox"/>
							IN STOCK		<input type="checkbox"/>
100	STOCK- ROOM	STAPLERS	SWI21101	COMPACT ELECTRIC/BATTERY	1/EA		12.49 USD	1	<input type="checkbox"/>
			112080	STAPLER, BLACK			IN STOCK		<input type="checkbox"/>
100	PALACE OFFICE SUPPLIES		12-121212	BLACK ELECTRIC STAPLER			12.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	196156	OFFICE DEPOT(R) BRAND HALF-STRIP ELECTRIC STAPLER, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	163460	STANLEY(R) BOSTITCH BBE ELECTRONIC STAPLER AND STAPLES, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	193622	SWINGLINE(R) PORTABLE ELECTRIC STAPLER, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	220376	SWINGLINE(R) CARTRIDGE ELECTRONIC STAPLER, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	459628	SWINGLINE(R) COMPACT ELECTRIC/ BATTERY STAPLER, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>
100	OFFICE DEPOT	STAPLERS	495515	SWINGLINE(R) HIGH-CAPACITY HEAVY DUTY STAPLER, BLACK	1/EA		9.99 USD	1	<input type="checkbox"/>

FIG. 51

5200 SHOPPING CART  
ADD NON-CATALOG ITEM

5205

CART WAS SAVED SUCCESSFULLY

SAVE

CART NAME  
DESCRIPTION  
PRIORITY

NEXT APPROVER  
VALUES...  
SEARCH FOR AN APPROVER...

PRWF  
POWF  
5235

SELECT FROM PROFILE VALUES...  
SELECT FROM ALL VALUES...  
SELECT FROM PROFILE VALUES...  
SELECT FROM ALL VALUES...

SUPPLIER / LINE ITEM DETAILS

SHOW LINE DETAILS

BECKMAN COULTER INC. MORE INFO...

5230

CONTRACT  
PO NUMBER  
QUOTE NUMBER

TO BE ASSIGNED

ADD NON-CATALOG ITEM FOR THIS SUPPLIER...

PRODUCT DESCRIPTION	CATALOG NO.	SIZE/PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE
1 REAGENT SYRINGE PLUNGER, 500UL	448974	EA	227.00	1 EA	227.00 USD
SUPPLIER SUBTOTAL					227.00 USD

STOCKROOM MORE INFO...

CONTRACT  
PO NUMBER  
QUOTE NUMBER

TO BE ASSIGNED

ADD NON-CATALOG ITEM FOR THIS SUPPLIER...

PRODUCT DESCRIPTION	CATALOG NO.	SIZE/PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE
2 ELECTRIC STAPLER, COMPACT, BLACK	SWI21101	1/EA	14.40	1 EA	14.40 USD
SUPPLIER SUBTOTAL					14.40 USD


5215

5220

5225

FIG. 52

5300 SALES ORDER QUEUE

Organization  PROFILE | LOGOUT

ORDER ASSIGNMENTS 1/20 ITEM(S), 211.36 USD

SEARCH FOR SUPPLIER PROFILE

INVENTORY MANAGEMENT | SALES ORDERS | ITEM/PRICE | HOME | MY FAVORITES | PRODUCT SEARCH | HISTORY |

SALES ORDER FULFILLMENT | SALES ORDER HISTORY | SHIPMENT HISTORY | SEARCH EXPORTS | FULFILLMENT CENTER ACCESS | FULFILLMENT CENTER SETTINGS

MY APPROVALS SELECT ANOTHER APPROVER  MY APPROVALS

+ CLICK TO FILTER SALES ORDERS

SHOW SALES ORDER DETAILS

ASSIGN SUBSTITUTE APPLY ACTION TO SELECTED SALES ORDERS:

- MY SALES ORDERS ?

RESULTS PER PAGE   SALES ORDERS FOUND: 1  PAGE   OF 1

SALES ORDER NO.	PO NO.	DEPARTMENT	PRIORITY	DATE/TIME	BUYER	ALLOCATION STATUS	WARNINGS	SHIPMENT STATUS	SELECT
598688 VIEW	WEET12427PO VIEW	PURCHASING	NORMAL			PARTIALLY ALLOCATED	△ PENDING BACKORDER	NO SHIPMENTS	<input type="checkbox"/>

ASSIGN SUBSTITUTE APPLY ACTION TO SELECTED SALES ORDERS:

- OPEN SALES ORDERS ?

RESULTS PER PAGE   SALES ORDERS FOUND: 2  PAGE   OF 1

SALES ORDER NO.	PO NO.	DEPARTMENT	PRIORITY	DATE/TIME	BUYER	ASSIGNEE	ALLOCATION STATUS	WARNINGS	SHIPMENT STATUS	ASSIGN	SELECT
598688 VIEW	WEET12427PO VIEW	PURCHASING	NORMAL				PARTIALLY ALLOCATED	△ PENDING BACKORDER	NO SHIPMENTS	<input type="checkbox"/>	<input type="checkbox"/>
123291 VIEW	WEET12280PO VIEW		NORMAL				FULLY ALLOCATED		NO SHIPMENTS	<input type="checkbox"/>	<input type="checkbox"/>

5328 5330 5332 5334 5336 5338 5340 5342 5344 5346 5348 5350

FIG. 53



5400 PICKING/PACKING SLIP

WHEN PRINTING THIS DOCUMENT, SET YOUR PRINTER TO LANDSCAPE

LOCATION	DELIVERY	CATALOG NO.	DESCRIP.	UOM	BARCODE/UPC	NUMBER	LOT	EXPIRATION DATE	PO REFERENCE NO.	LINE ORDERED	ALLO-CATED	BACK-ORDERED
TRIANGLE UNIVERSITY> CHEM BLDG >FLOOR 01> SURPLUS STORE	PURCHASING	SWI21101	ELECTRIC STAPLER, COMPACT, BLACK	1/EA		WEET12426PO	1	1	1	1	1	1

5405 ORDER - PACKING SLIP

WHEN PRINTING THIS DOCUMENT, SET YOUR PRINTER TO LANDSCAPE

SUPPLIER INFO		PO REFERENCE NO.	ORDER PLACED ON	TOTAL
FULFILLMENT ADDRESS 1 PHONE NO. TOLL-FREE PHONE NO. 5415		WEET12426PO	5/21/2008	14.40 USD

BUYER INFO		SHIP TO INFO	BILL TO INFO
WEET ORGANIZATION ATTN: RADIOACTIVE SAFETY OFFICER 1234 MAIN STREET RADIOACTIVE DELIVERY DOCK MORRISVILLE, NC 27560 UNITED STATES		WEET ORGANIZATION ACCOUNTS PAYABLE 1234 MAIN STREET MORRISVILLE, NC 27560 UNITED STATES	

5430 LINE ITEM DETAILS

PRODUCT DESCRIPTION	CATALOG NO.	BARCODE/UPC	AMOUNT/QUANTITY	UOM	UNIT PRICE	EXT PRICE	STATUS	ESTIMATED SHIP DATE
1 ELECTRIC STAPLER, COMPACT, BLACK	SWI21101		1	1/EA	14.40	14.40	SHIPPED	

LOCATION TRIANGLE UNIVERSITY>CHEM BLDG>FLOOR 01>SURPLUS STORE

ORDERED QTY 1

MFG NAME: SWINGLINE

MFG CATALOG NO.: SWI21101

PREVIOUSLY SHIPPED: 0

FIG. 54

5500 POSTATUS/ACKNOWLEDGEMENT

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REPLENISHMENT REPORT

W @ t Organization

PROFILE | LOGOUT

INVENTORY SEARCH

1 120 ITEM(S), 211.36 USD

SEARCH FOR SUPPLIER PROFILE

GO

INVENTORY MANAGEMENT | SALES ORDERS | ITEM/PRICE | HOME | MY FAVORITES | PRODUCT SEARCH | HISTORY | MORE >>

INVENTORY SEARCH | INVENTORY HISTORY | IMPORT/EXPORT | LOCATION MGT | INVENTORY REPORTS

+ EXPAND TO REFINE SEARCH

REQUEST EXPORT

SHOW DETAILS

ADD TO CURRENT CART

GO

REPLENISHMENT SEARCH RESULTS

INVENTORY RESULTS FOUND: 1

RESULTS PER PAGE 20

1 OF 1

WEIGHT	MANUFACTURER	CATALOG #	PRODUCT DESCRIPTION	UOM	SIZE	QTY ON HAND	QTY ON ORDER	PENDING SALES	QTY ON ORDER	PREFERRED REP. SUPPLIER	PREFERRED REP. ITEM#	PRICE	QUANTITY	ADD TO CART	SELECT
100	SWINGLINE	SWI21101	ELECTRIC STAPLER, COMPACT, BLA... MORE...	1/EA		0	0	7	7	CORPORATE EXPRESS	SWI21101	9.99 USD	48		
5620															
5624 5626															
5622															
ADD TO CURRENT CART															
GO															

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5628 5630 5632 5634 5636

FIG. 56

5700 REPLENISHMENT ORDER

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5800 REPLENISHMENT REPORT

5805

Organization PROFILE | LOGOUT

NEW QTY RECEIPT

INVENTORY MANAGEMENT | SALES ORDERS | ITEM PRICE | HOME | MY FAVORITES | PRODUCT SEARCH | HISTORY | MORE >>

DRAFT RECEIPTS | RECEIPT HISTORY | DRAFT INVOICE | INVOICE HISTORY | MATCHING

SELECT DRAFT CART OR ADD ITEM TO CART

SEARCH FOR SUPPLIER PROFILE

GO

5810

ADD PO | SAVE UPDATES | COMPLETE

5812 5814

SAVE

5820

RECEIPT SUMMARY | COMMODITY RECEIVING

PO NO.	PO LINE NO.	PRODUCT NAME	CATALOG NO.	QTY/UOM ORDERED	PREVIOUS RECEIPTS	QUANTITY
WEET12428PO	1	COMPACT ELECTRIC STAPLER, 12 SHEET, 3/8" THROAT DEPTH, HALF STRIP, BLACK	SWI21101	48 EA		48

STOCKED ITEM ELECTRIC STAPLER, COMPACT, BLACK

STOCKED ITEM SWI21101

NUMBER

STOCKED UNITS 1 1/EA

FULFILLMENT CENTER [FULFILLMENT ADDRESS 1]

LOCATION: SURPLUS STORE (CHEM BLDG-FLOOR 01-SURPLUS STORE)

EXPIRATION DATE MM/DD/YY

LOT NUMBER


PER ITEM COST (ADD TS&H) [9.99]

5825

SAVE

FIG. 58A

REPLENISHMENT ALLOCATION



[PROFILE](#) | [LOGOUT](#)

[NEW QTY RECEIPT](#)

[SELECT DRAFT CART OR ADD ITEM TO CART](#)

[SEARCH FOR SUPPLIER PROFILE](#)
[GO](#)

[INVENTORY MANAGEMENT](#) | [SALES ORDERS](#) | [ITEM PRICE](#) | [HOME](#) | [MY FAVORITES](#) | [PRODUCT SEARCH](#) | [HISTORY](#) | [SETTLEMENT](#)


[DRAFT RECEIPTS](#) | [RECEIPT HISTORY](#) | [DRAFT INVOICE](#) | [INVOICE HISTORY](#) | [MATCHING](#)


[CREATE QTY RECEIPT](#)


[CREATE COST RECEIPT](#)

5852

5860

RECEIPT NO. R-001469  HAS BEEN CREATED FOR THE FOLLOWING PO NO(S):

• PO/REFERENCE NO. WEET12428PO 

 [CLICK HERE TO ACCESS STOCKING LIST / PUT AWAY LIST](#)

5870

THE FOLLOWING BACKORDERED SALES ORDER LINES ARE ALLOCATED

SALES ORDER NO.	PO NO.	STOCKED ITEM	STOCKED ITEM NUMBER	QTY ORDERED	QTY ALLOCATED
598688	WEET12428PO	ELECTRIC STAPLER, COMPACT, BLACK	SW/21101	50	7

5875

5880

5850

FIG. 58B

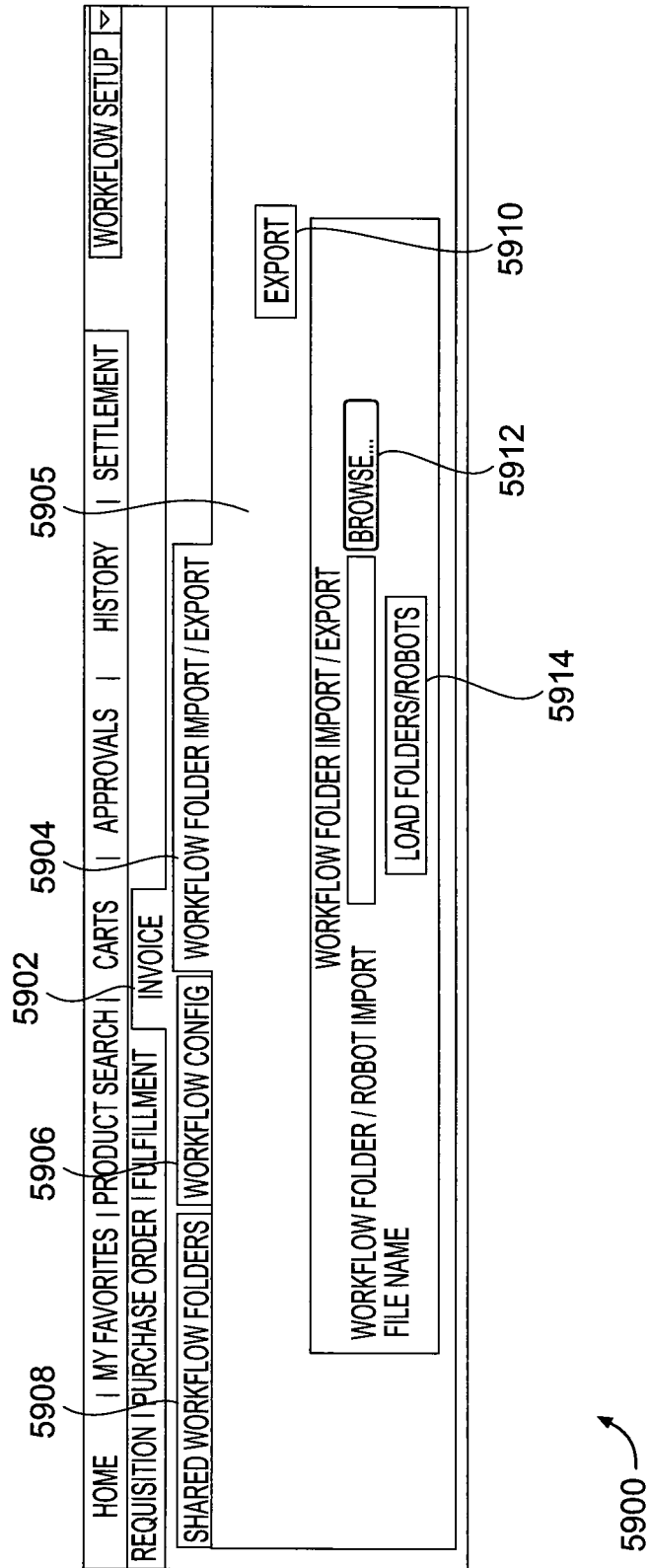


FIG. 59A

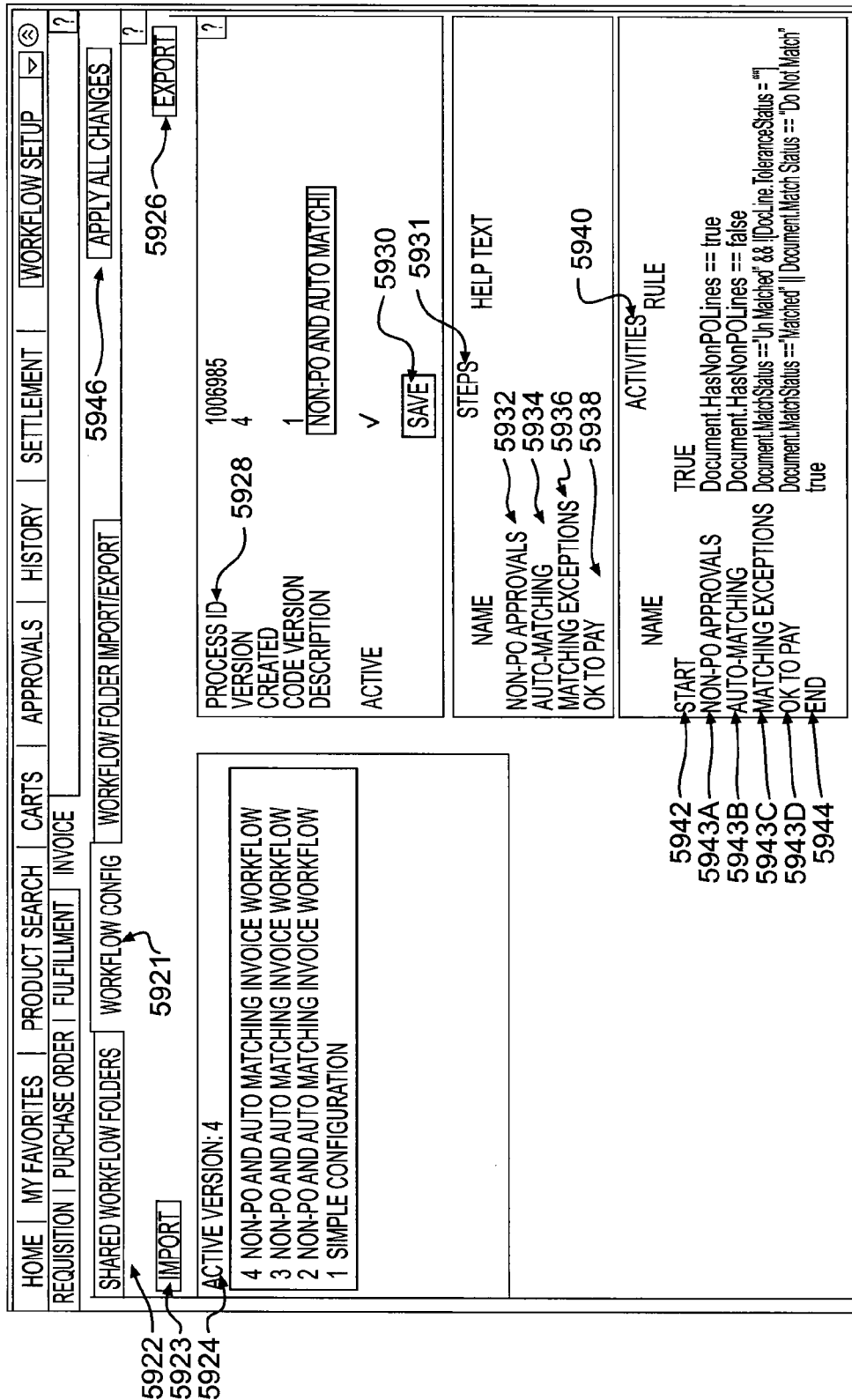


FIG. 59B



HOME | MY FAVORITES | PRODUCT SEARCH | CARTS | APPROVALS | HISTORY | SETTLEMENT | WORKFLOW SETUP

REQUISITION | PURCHASE ORDER | FULFILLMENT | INVOICE

SHARED WORKFLOW FOLDERS | WORKFLOW CONFIG | WORKFLOW FOLDER IMPORT/EXPORT | APPLY ALL CHANGES

CREATE NEW FOLDER

FOLDERS

MATCHING EXCEPTION 5954

MATCHING EXCEPTIONS 5956

NON-PO APPROVALS

REMIT TO VALIDATION

SELECTED FOLDER 5958

MATCHING EXCEPTION 5960

SAVE

ADD USER

APPROVER NAME	USER NAME	EMAIL	PHONE	REMOVE
		@sciquest.com	+1 (919)	REMOVE
		@sciquest.com		REMOVE

5950

FIG. 59C

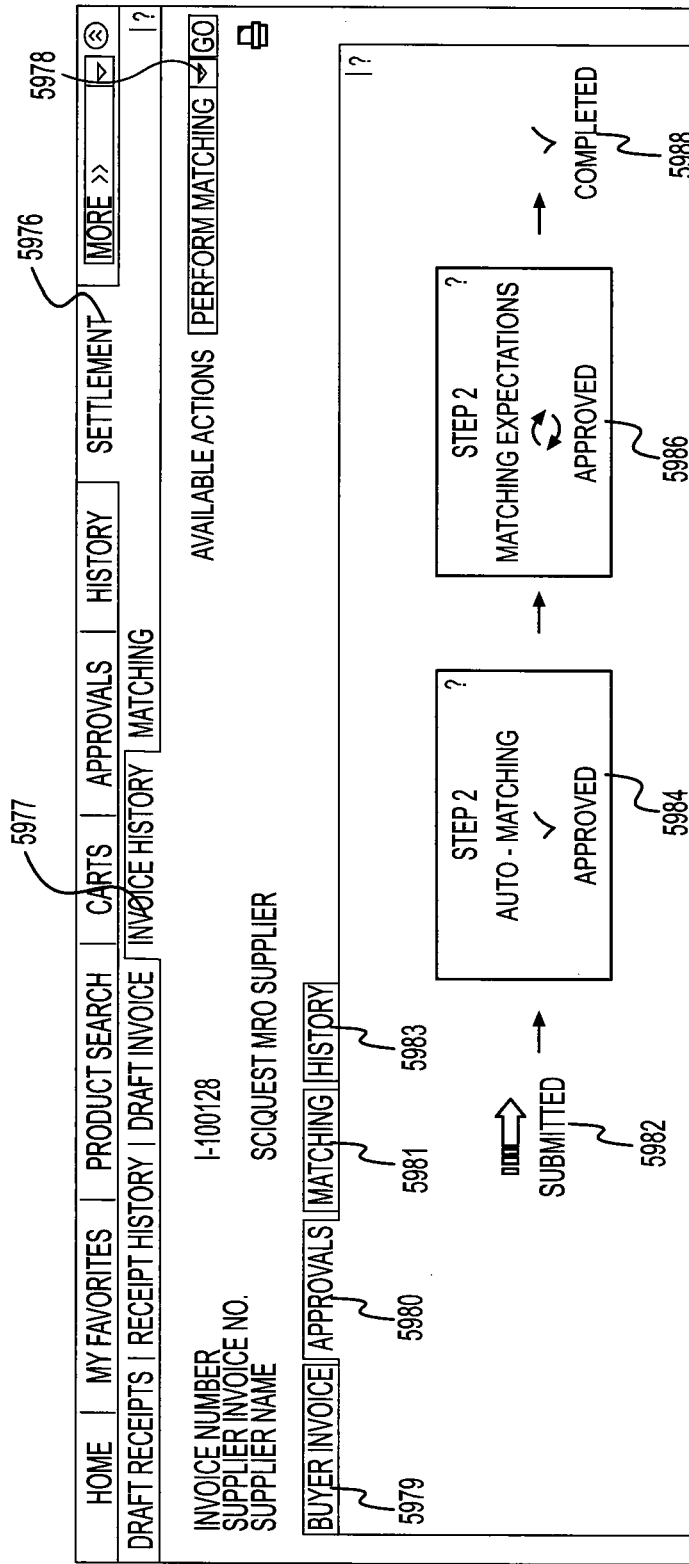


FIG. 59D

<a href="#">HOME</a>	<a href="#">MY FAVORITES</a>	<a href="#">PRODUCT SEARCH</a>	<a href="#">CARTS</a>	<a href="#">APPROVALS</a>	<a href="#">HISTORY</a>	<a href="#">SETTLEMENT</a>	<a href="#">MORE &gt;&gt;</a>
<a href="#">REQUISITION   PURCHASE ORDER</a>		<a href="#">INVOICE   SALES ORDER FULFILLMENT</a>		<a href="#">PURCHASE ORDER OUTBOX</a>		<a href="#">INVOICE OUTBOX</a>	

± CLICK TO FILTER INVOICE APPROVAL'S
1 ?
5995

SHOW INVOICE DETAILS

ASSIGN SUBSTITUTE

- MY INVOICE APPROVALS

RESULTS PER PAGE 10 ▾										
INVOICE NO.	STATE	SUPPLIER INVOICE NO.	SUPPLIER NAME	INVOICE DATE	TYPE	AMOUNT	DUE DATE	DISCOUNT	ACTION	SELECT
I-00128 VIEW	ACTIVE		SCIQEST MRO SUPPLIER		INVOICE	25,495.00 USD				APPROVE 5996

APPLY ACTION TO SELECTED INVOICE(S) [GO]

1 ?

5998

ASSIGN SUBSTITUTE

- MY INVOICE APPROVALS

RESULTS PER PAGE 10 ▾										
INVOICE NO.	STATE	SUPPLIER INVOICE NO.	SUPPLIER NAME	INVOICE DATE	TYPE	AMOUNT	DUE DATE	DISCOUNT	ACTION	SELECT
I-00128 VIEW	ASSIGNED		SCIQEST MRO SUPPLIER		INVOICE	25,495.00 USD				
I-00127 VIEW	NOT ASSIGNED	0717	SCIQEST MRO SUPPLIER		INVOICE	-163.00 USD			APPROVE	
I-00125 VIEW	NOT ASSIGNED		SCIQEST MRO SUPPLIER		INVOICE	283.30 USD				
I-00124 VIEW	NOT ASSIGNED		SCIQEST MRO SUPPLIER		INVOICE	140.30 USD				
I-00123 VIEW	NOT ASSIGNED	0715	SCIQEST MRO SUPPLIER		INVOICE	-163.00 USD				
I-00122 VIEW	NOT ASSIGNED	0715	SCIQEST OFFICE SUPPLIER (SALES ORDER DELIVERY)		INVOICE	162.50 USD				
I-00121 VIEW	NOT ASSIGNED		PERKIN LIFE SCIENCES		INVOICE	719.00 USD				
I-00117 VIEW	NOT ASSIGNED	071499	FISHER SCIENTIFIC		INVOICE	548.99 USD				
I-00116 VIEW	NOT ASSIGNED	071498	FISHER SCIENTIFIC		INVOICE	281.19 USD				
I-00115 VIEW	NOT ASSIGNED	071497	FISHER SCIENTIFIC		INVOICE	281.19 USD				

APPLY ACTION TO SELECTED INVOICE(S) [GO]

1 ?

5999

RESULTS PER PAGE 10 ▾

< PAGE 1 OF 2 >

**FIG. 59E**

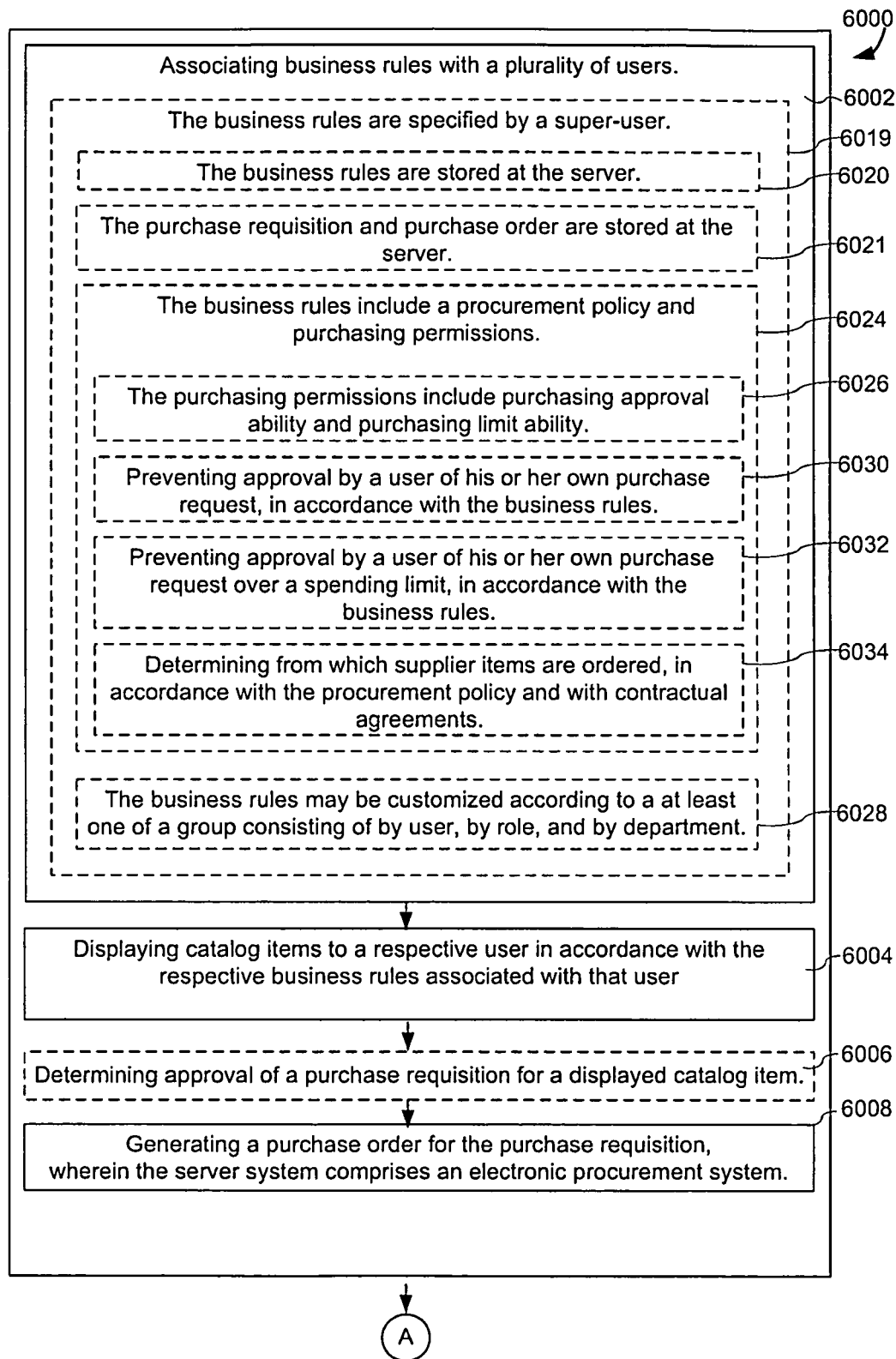


Figure 60

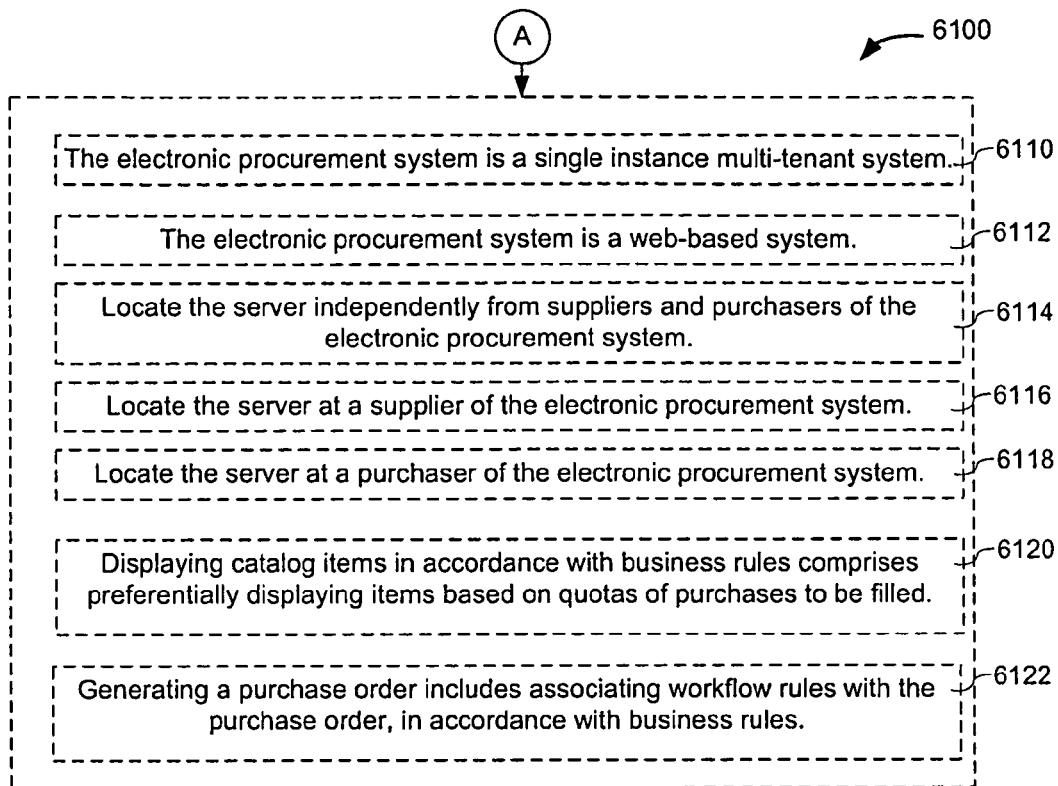


Figure 61

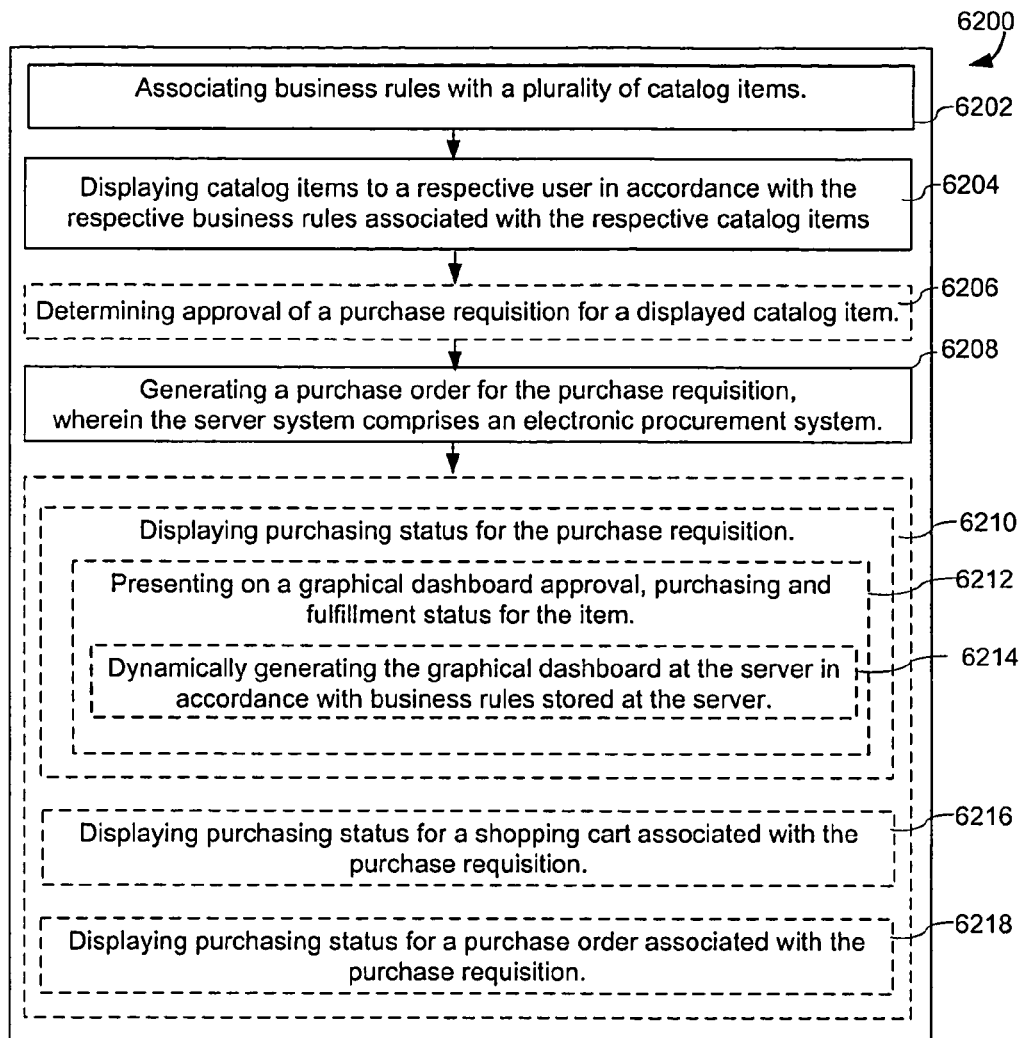


Figure 62

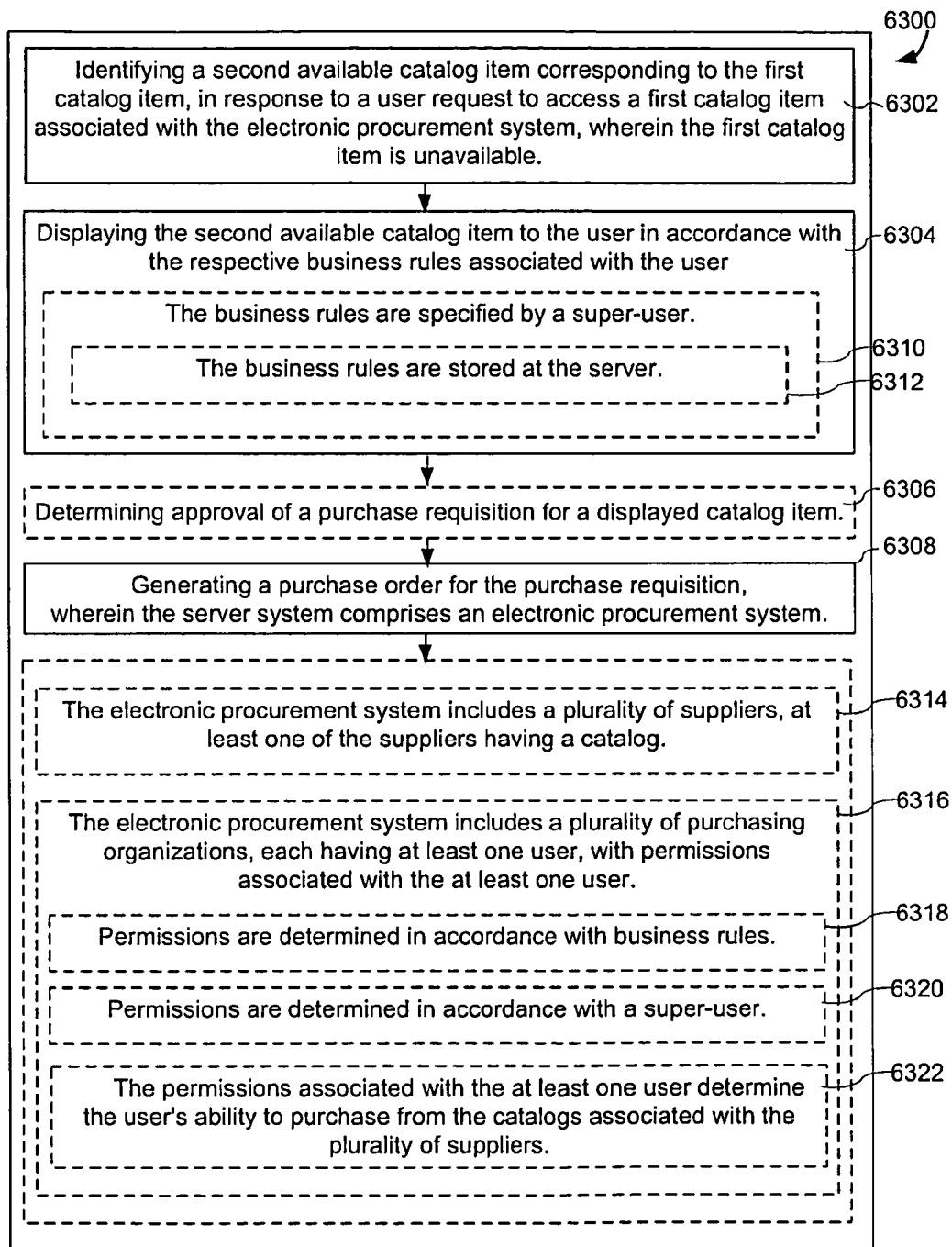


Figure 63

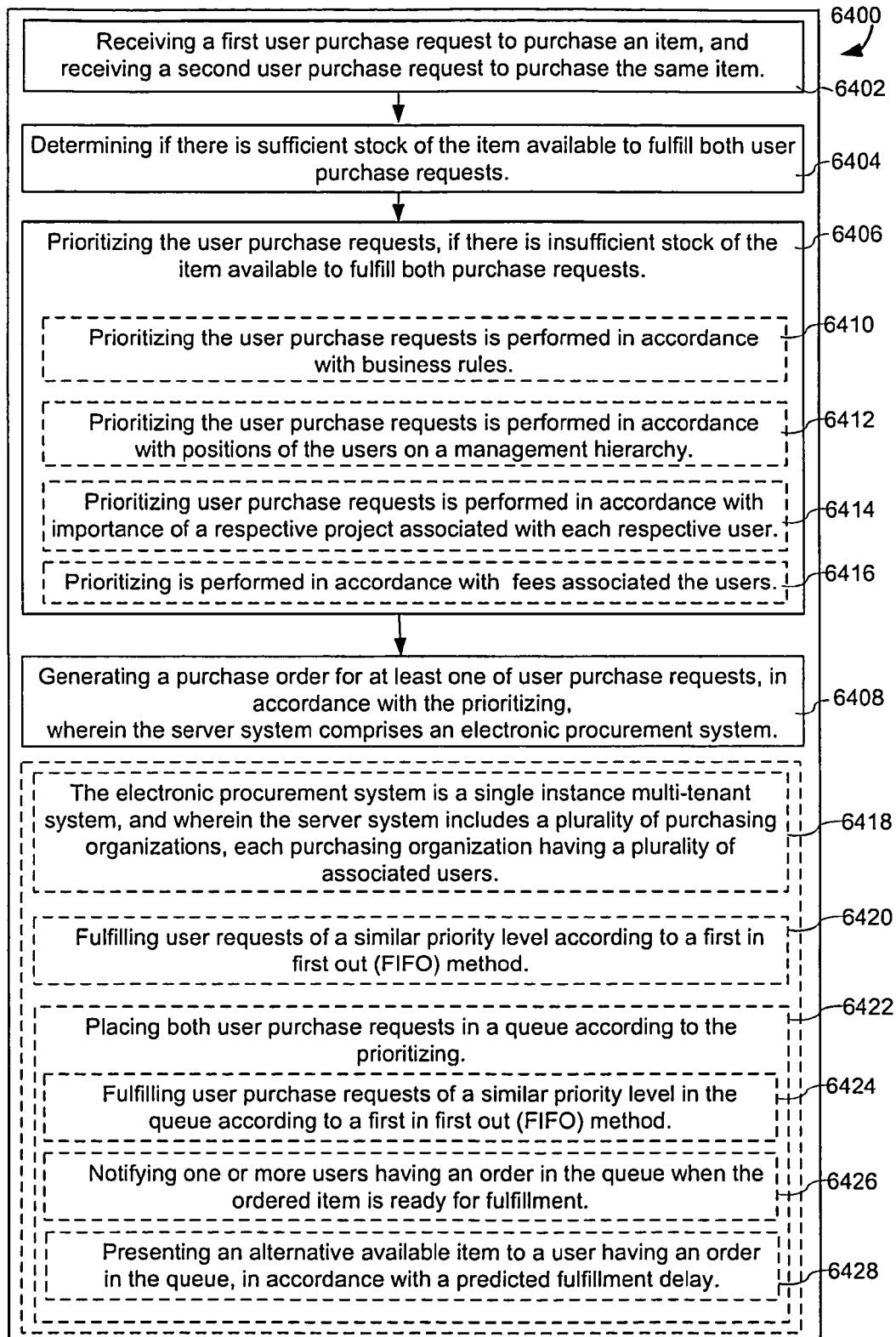


Figure 64



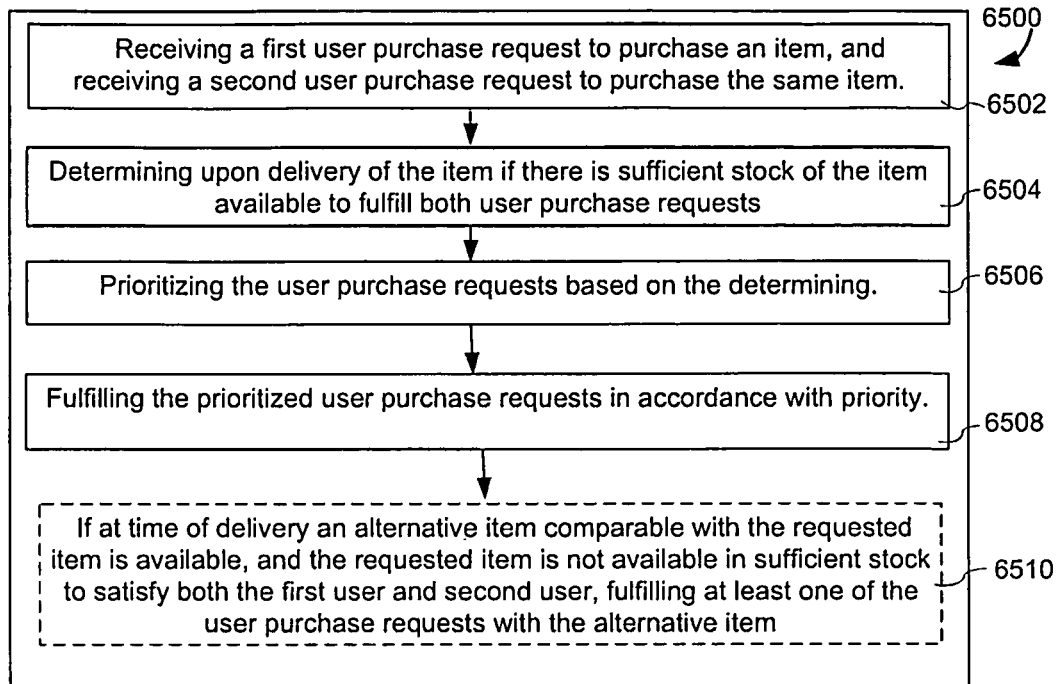


Figure 65

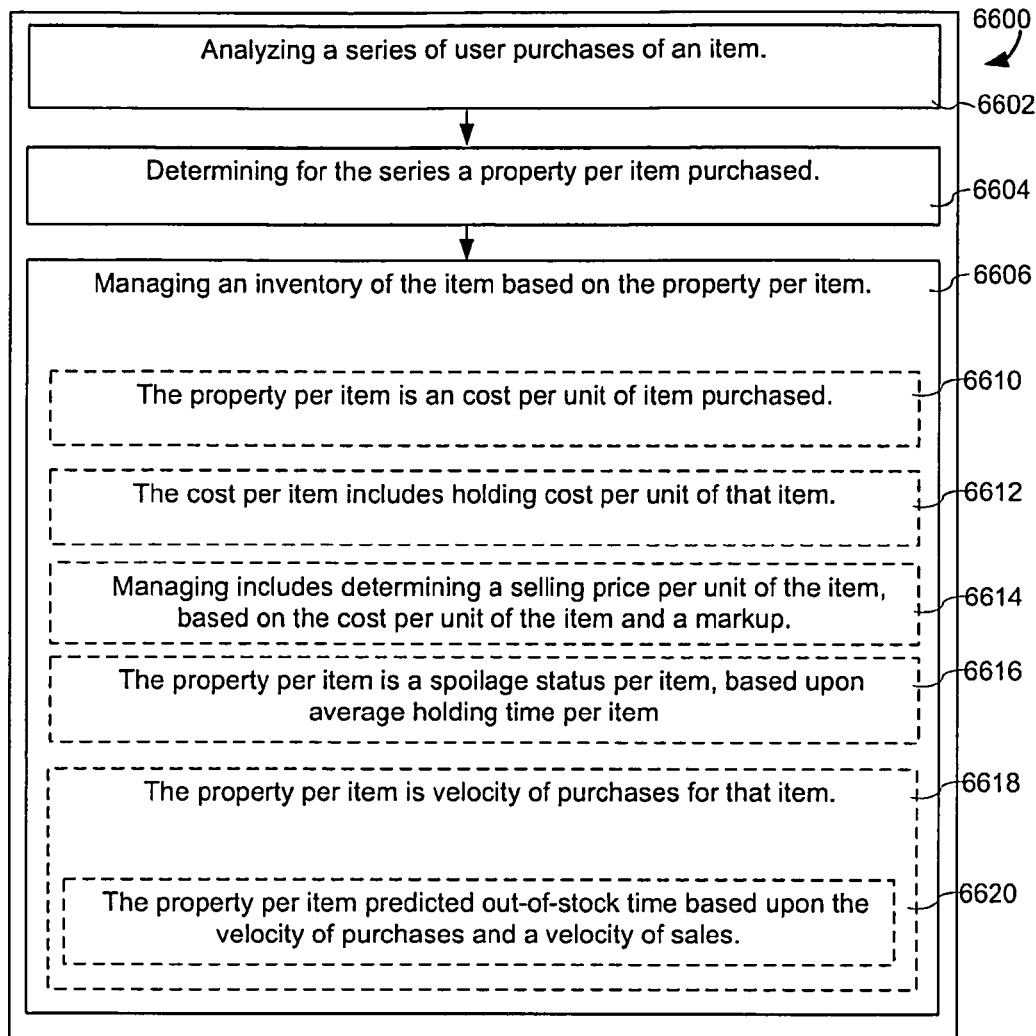


Figure 66

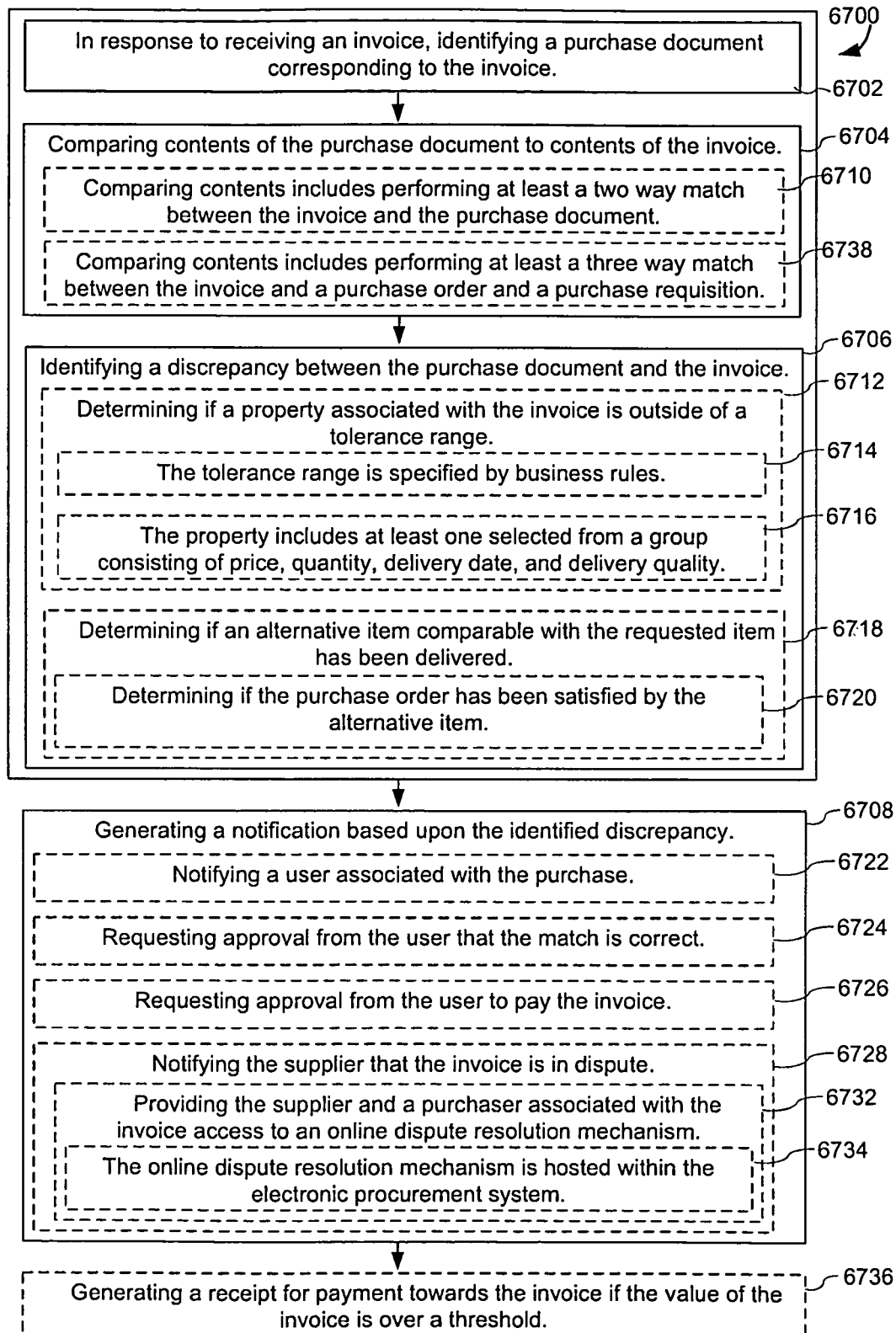


Figure 67

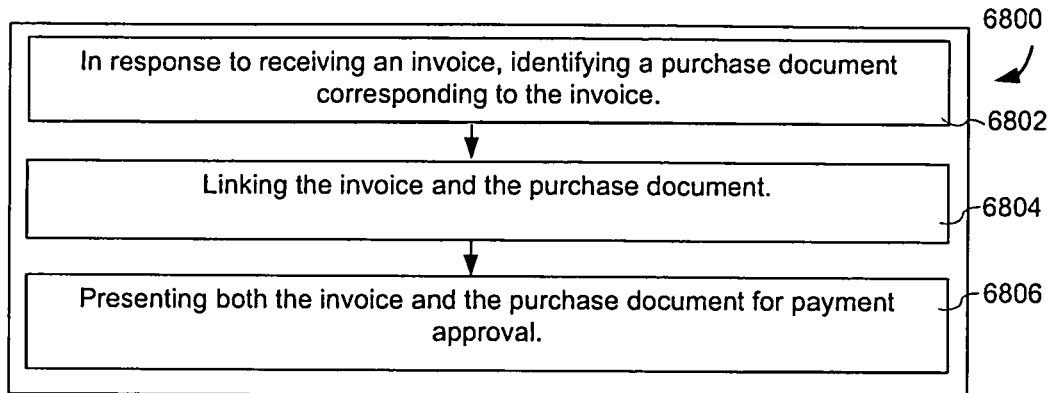


Figure 68

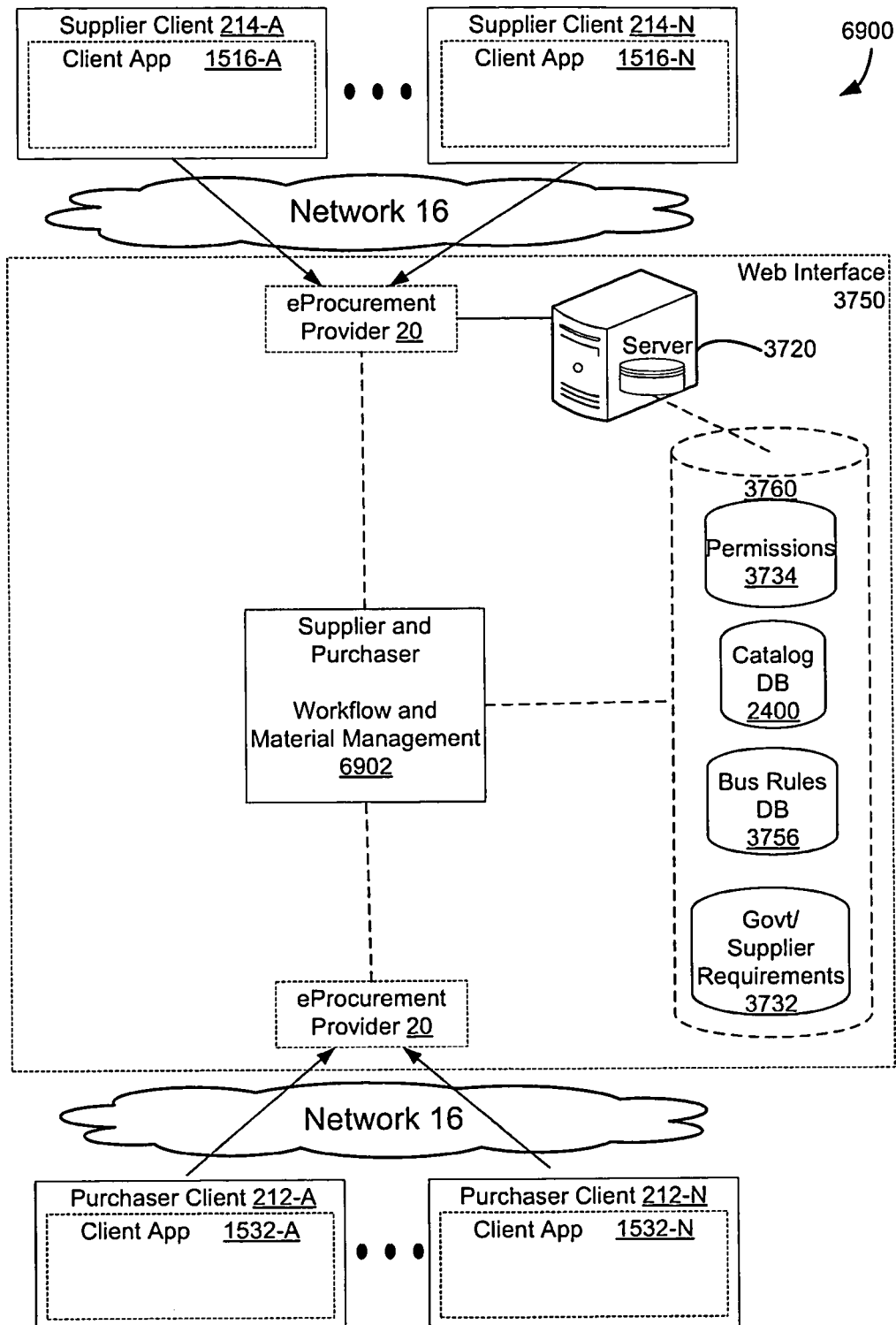


Figure 69

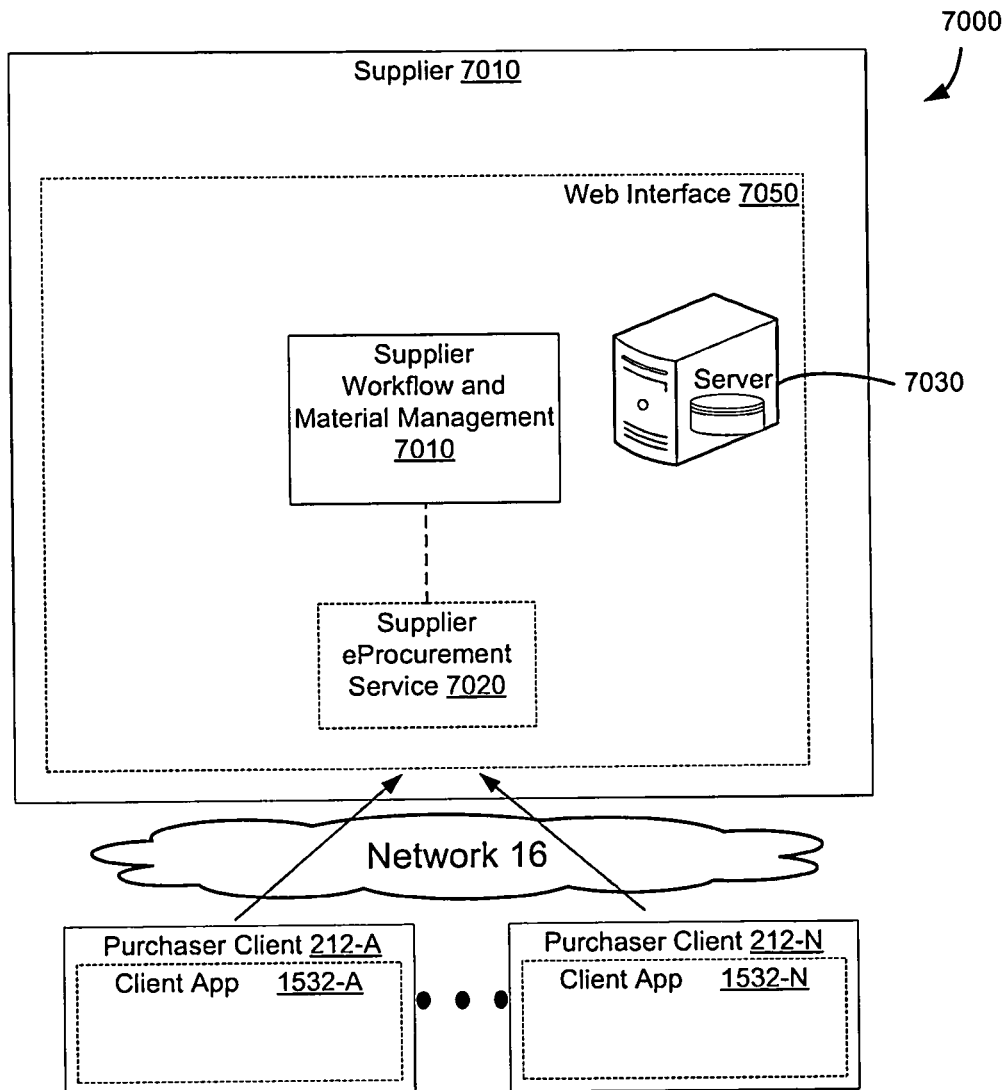


Figure 70

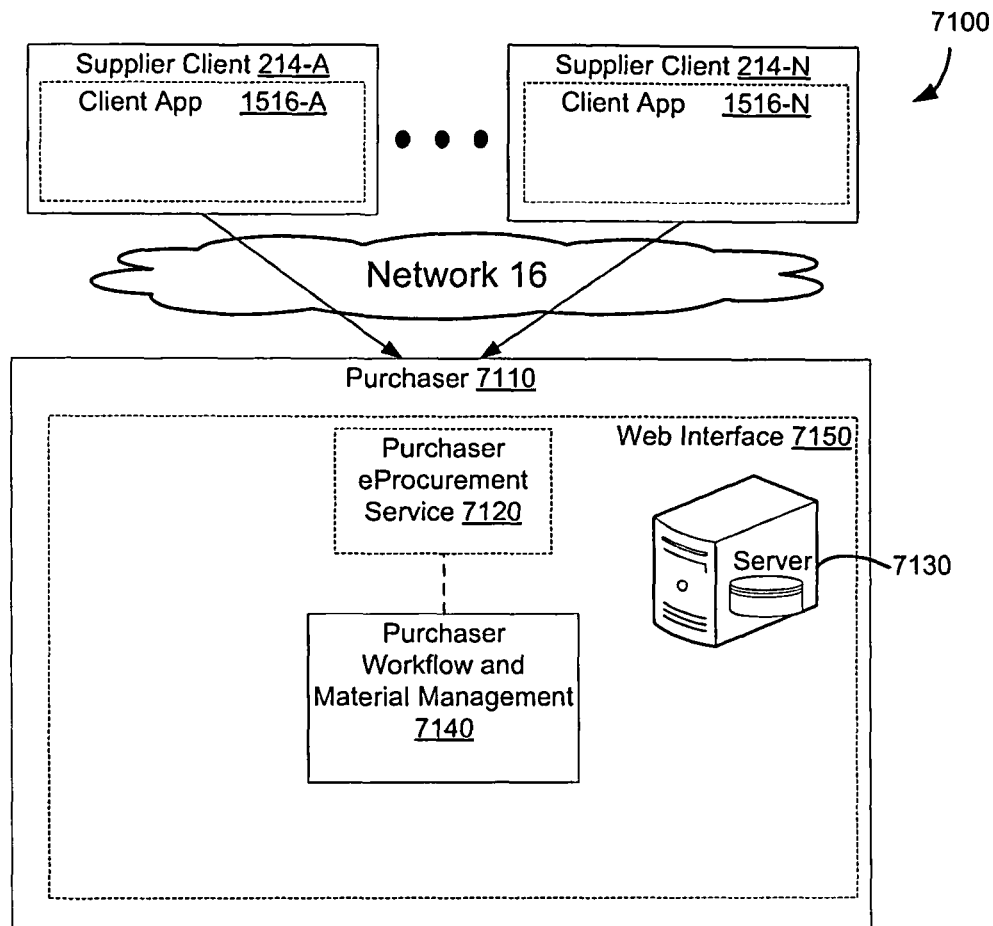


Figure 71

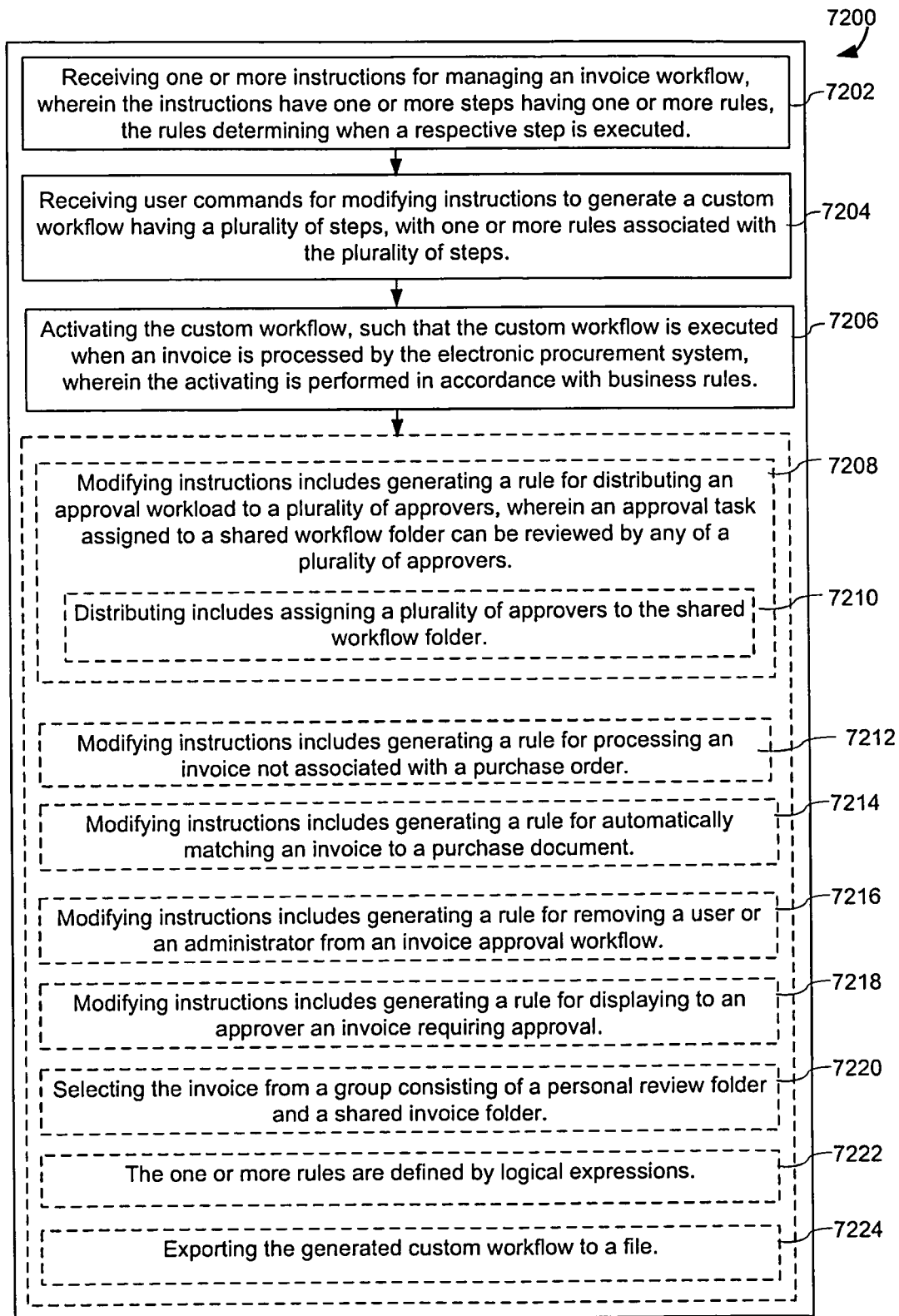


Figure 72



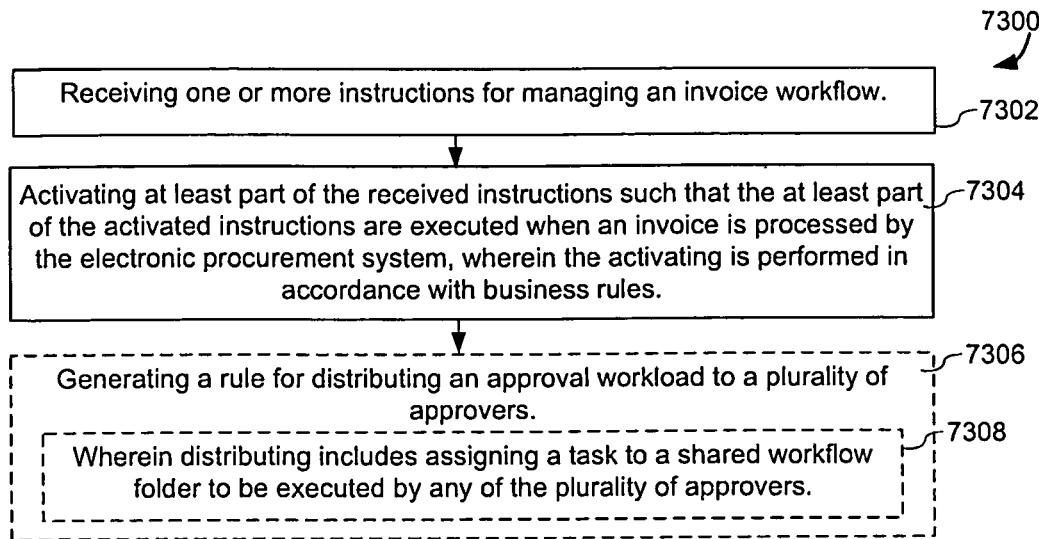


Figure 73

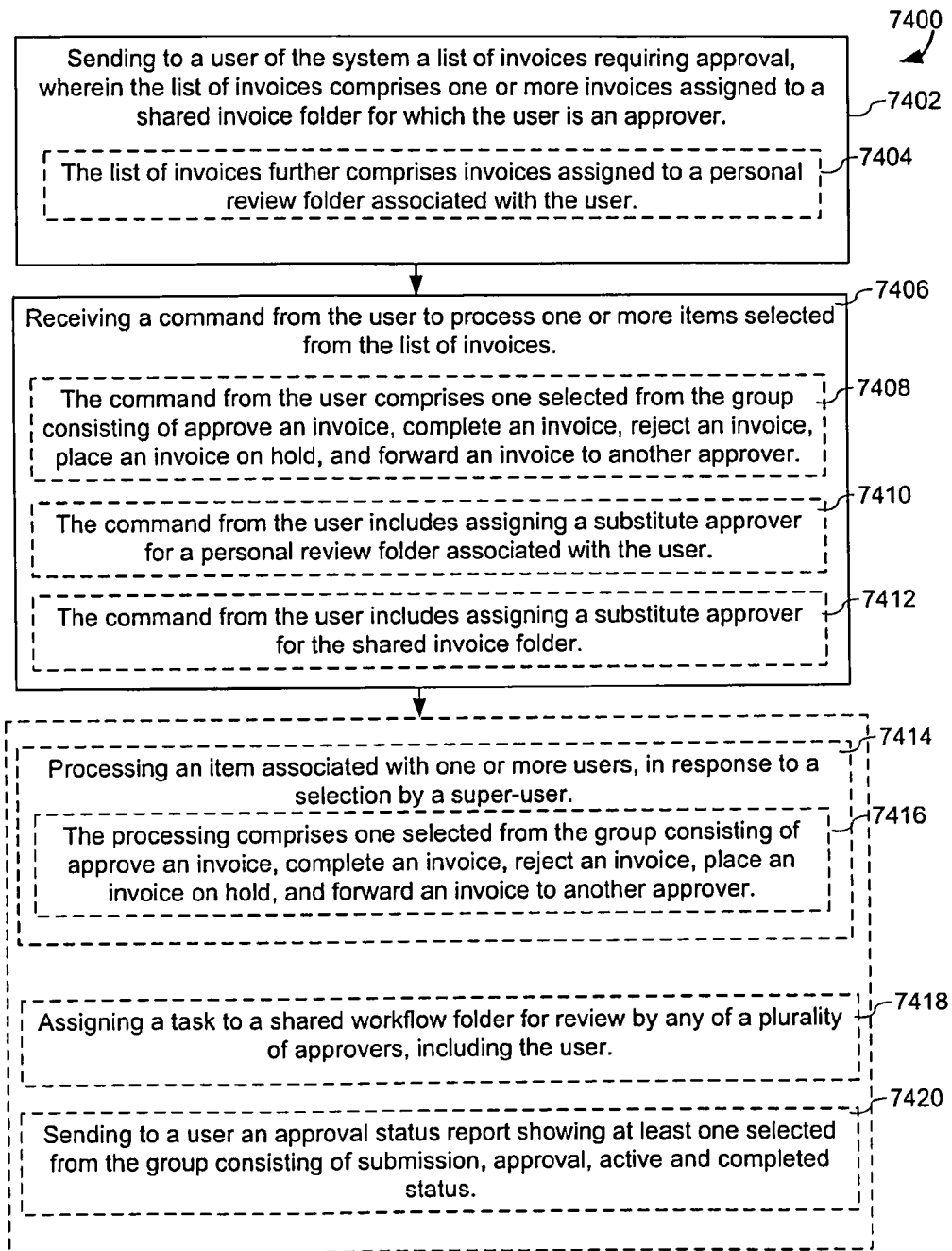


Figure 74

```

    <?xml version="1.0" encoding="UTF-8"?>
    <!DOCTYPE WorkflowFolderMessage SYSTEM "https://
    trinity.sciquest.com/app_docs/dtd/workflow/WorkflowFolder.dtd">
    <WorkflowFolderMessage>
7502  <Folder name="Remit To Validation" folderType="shared">
        <WorkflowType>invoice</WorkflowType>
        </Folder>
7504  <Folder name="Non-PO Approvals" folderType="shared">
        <WorkflowType>invoice</WorkflowType>
        </Folder>
7506  <Folder name="Matching Exceptions" folderType="shared">
        <WorkflowType>invoice</WorkflowType>
        </Folder>
7508  <Folder name="Matching Exception" folderType="shared">
        <WorkflowType>invoice</WorkflowType>
        </Folder>
7510  <Folder name="Over Credits" folderType="shared">
        <WorkflowType>invoice</WorkflowType>
        </Folder>
7512  <Folder name="Auto-Matching" folderType="automated">
        <WorkflowType>invoice</WorkflowType>
        <FolderRobotId>506</FolderRobotId>
        </Folder>
7514  <Folder name="OK to Pay" folderType="automated">
        <WorkflowType>invoice</WorkflowType>
        <FolderRobotId>505</FolderRobotId>
        </Folder>
7516  <Folder name="Over Credit-Auto Reject" folderType="automated">
        <WorkflowType>invoice</WorkflowType>
        <FolderRobotId>504</FolderRobotId>
        </Folder>
7518  <Robot id="506"> AUTO MATCH
        <ProcessingTimeout>1800</ProcessingTimeout>
        <RetryInterval>300</RetryInterval>
        <RetryCount>0</RetryCount>
        <SocketTimeout>30</SocketTimeout>
        </Robot>
7520  <Robot id="505"> OKAY TO PAY
        <ProcessingTimeout>1800</ProcessingTimeout>
        <RetryInterval>300</RetryInterval>
        <RetryCount>0</RetryCount>
        <SocketTimeout>30</SocketTimeout>
        </Robot>
7522  <Robot id="504"> OVER CREDIT/INVOICE PROCESS
        <ProcessingTimeout>1800</ProcessingTimeout>
        <RetryInterval>300</RetryInterval>
        <RetryCount>0</RetryCount>
        <SocketTimeout>30</SocketTimeout>
        </Robot>
    </WorkflowFolderMessage>

```

Figure 75

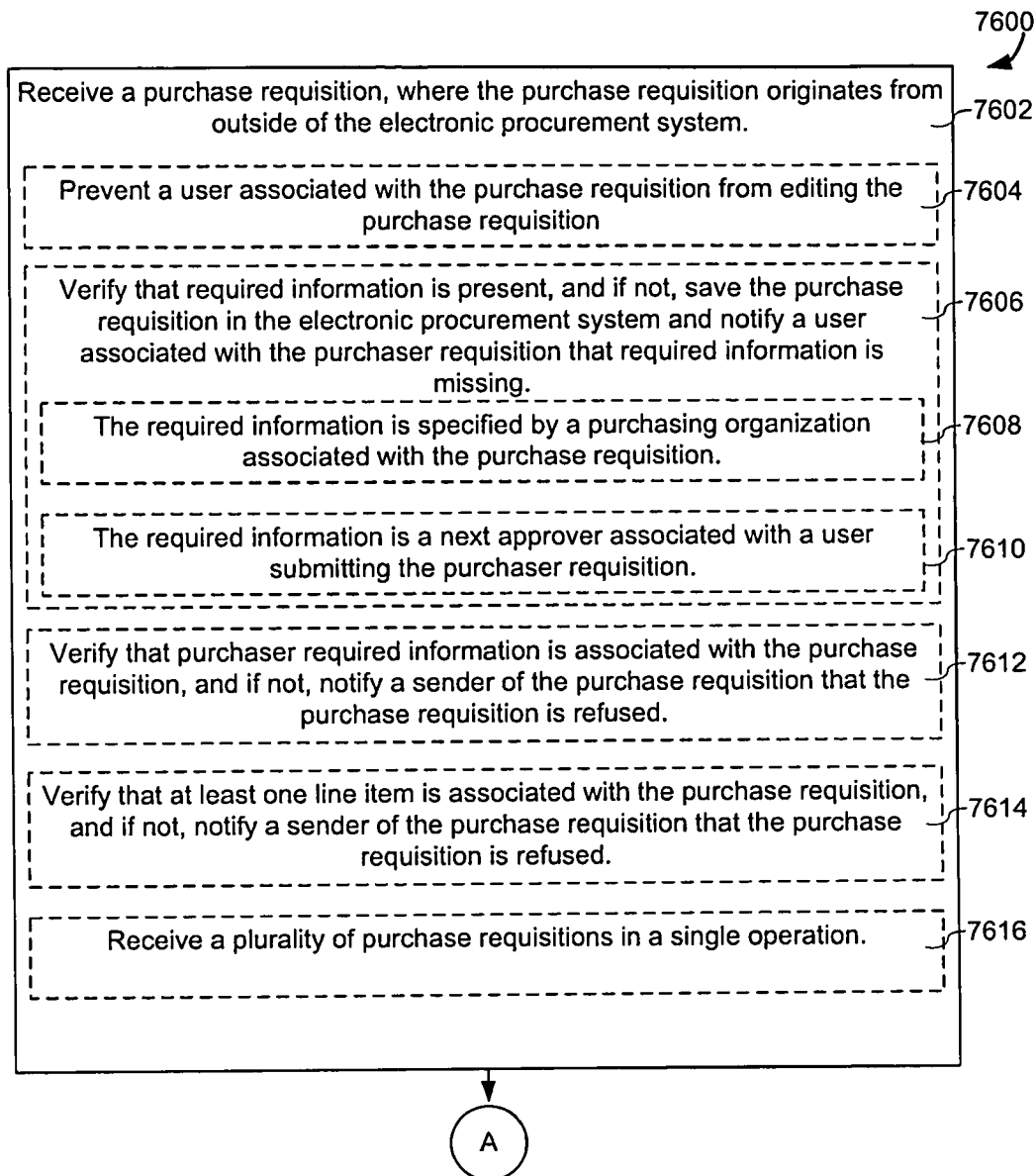


Figure 76A

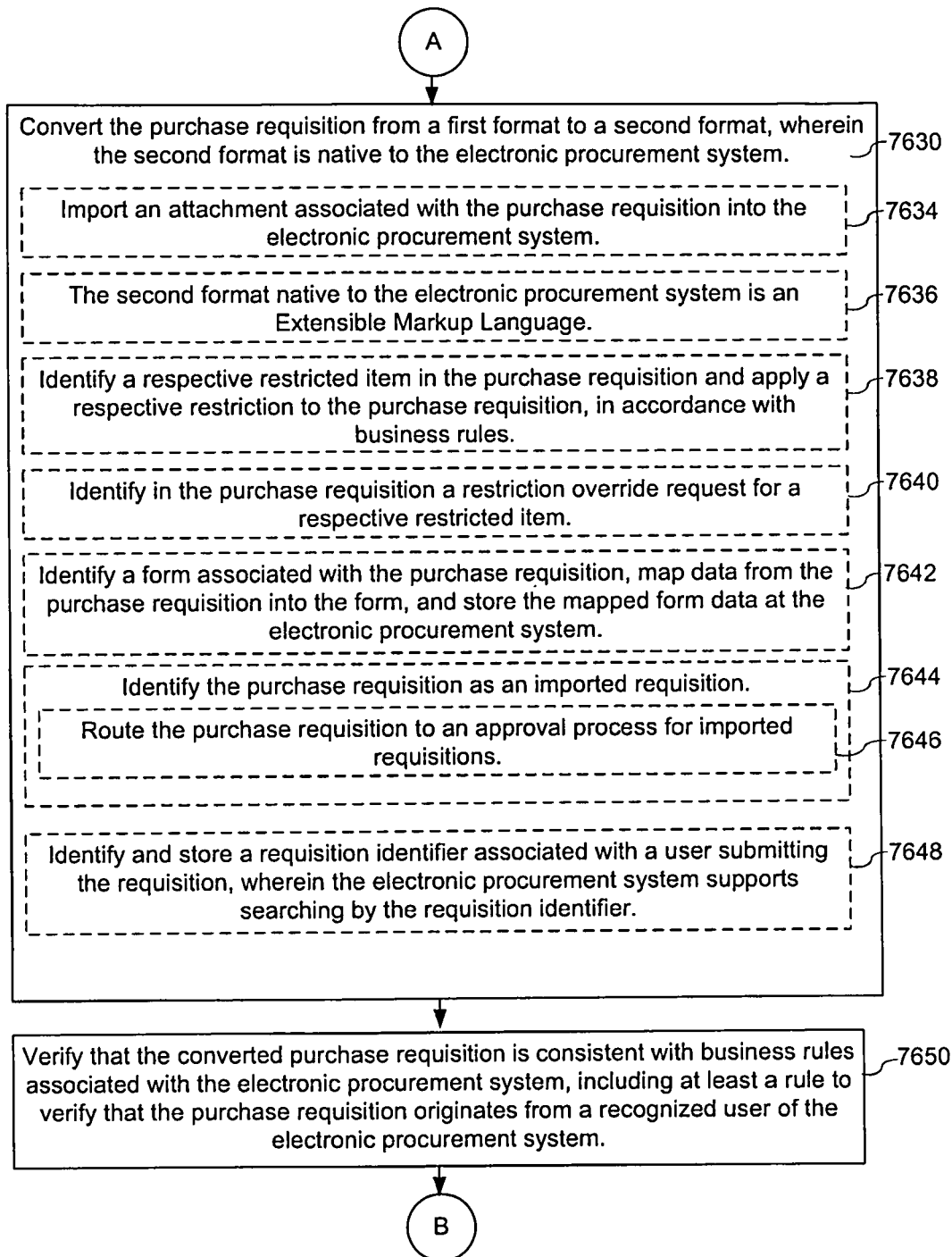


Figure 76B

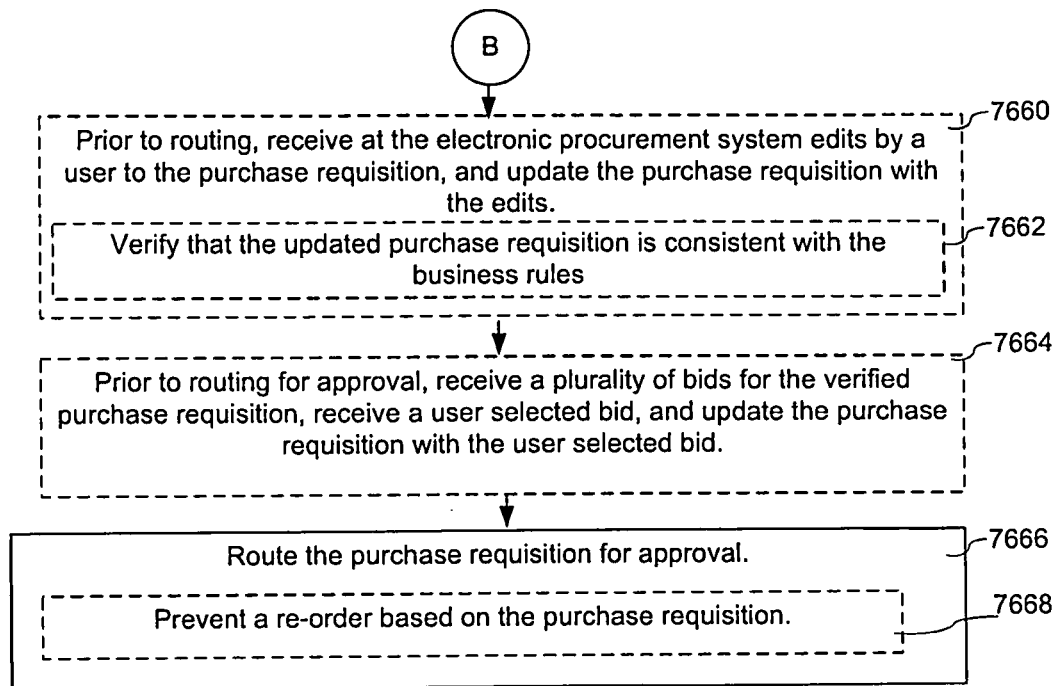


Figure 76C

sciQuest SQA New Cart		PROFILE SUMMARY- REQUISITION 107921		TEST 1 15 ITEM(S). 41.00 USD*	
HOME   MY FAVORITES   PRODUCT SEARCH		SEARCH FOR SUPPLIER PROFILE		GO	
ACTIVE CART   DRAFT CARTS   MY FAVORITES   MY REQUISITIONS		CARTS: APPROVALS   HISTORY   SETTLEMENT   MORE >>		GO	
ADD NON-CATALOG ITEM		ADD NOTES TO HISTORY		GO	
REQUISITION   PR APPROVALS   PO PREVIEW   HISTORY		HIDE VALUE DESCRIPTIONS		HIDE	
SUMMARY   BILLING DETAILS SECTION   CART DETAILS SECTION   ACCOUNT DETAILS SECTION   TAXES/S&H		ACCOUNT DETAILS SECTION		EDIT	
SHIPPING GROUP ~ 7710		SPLITTABLE CUSTOM FIELD GROUP		EDIT	
BILLING GROUP ~ 7712		DEPARTMENT ACCOUNT PROJECT CODE		EDIT	
CREDIT CARD GROUP		TEST VALUE 2 TEST PROJECT 1		EDIT	
NO CREDIT CARD HAS BEEN ASSIGNED		FOR TESTING FOR TESTING PROJECTS		EDIT	
DELIVERY DETAILS ~ 7714		ACCOUNTING ~ 7722		EDIT	
REQ DELIVERY		ACCOUNTING DATE		EDIT	
SHIP VIA		INTERNAL ATTACHMENTS ~ 7724		EDIT	
ATTACHMENTS COMMON FOR ALL SUPPLIERS		ADD ATTACHMENT...		EDIT	
ADD ATTACHMENT...		INTERNAL NOTE		EDIT	
NOTE TO ALL SUPPLIERS		PRWF		YES[1]	
PO CLAUSES		POWF		YES[ONE]	
EDIT CLAUSES		CK TEST FIELD		VIEW EDIT BY LINE ITEM...	
VIEW EDIT BY LINE ITEM...		VIEW EDIT BY LINE ITEM...		VIEW EDIT BY LINE ITEM...	
HIDE LINE DETAILS		SUPPLIER / LINE ITEM DETAILS ~ 7726		?	
AMERSHAM BIOSCIENCES CORP.		FOR SELECTED LINE ITEMS   WITHDRAW SELECTED ITEMS		GO	
800 CENTENNIAL AVE., PISCATAWAY, NY 08855-1327 US		PO NUMBER		TO BE ASSIGNED	
MORE INFO...		CONTRACT		ACCOUNT CODE	
		ACCOUNT CODE		ACCOUNT CODE_DATA	
		QUOTE NUMBER		PRICING CODE	
		PRICING CODE		PRICING CODE_DATA	
		SUPPLIER ONLY FIELDS VARY BY LINE		VIEW EDIT BY LINE ITEM...	
		VIEW EDIT BY LINE ITEM...		VIEW EDIT BY LINE ITEM...	

Figure 77

TO FIGURE 77 (cont')

FROM FIGURE 77

ADD NON-CATALOG ITEM FOR THIS SUPPLIER...

PRODUCT DESCRIPTION	CATALOG NO	SIZE/PACKAGING DATA	UNIT PRICE	QUANTITY	EXT. PRICE
<b>1 TESTING LINE 2</b> MORE INFO... ● SUPPLIER ONLY FIELDS VALUES DIFFER FROM HEADER VIEW/EDIT COPY TO OTHER LINES MANUFACTURER NAME NAME_DATA CAPITAL EXPENSE ✓ MANUFACTURER CATALOGNUMBER_DATA TAXABLE ✕ PART NUMBER 12-34-56-00 COMMODITY CODE TOOLS UNSPSC REPLENISH STOCK ✕ MORE INFO... PO CLAUSES EDIT CLAUSES SUPP CF ✕ INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENT... EXTERNAL NOTE ATTACHMENTS FOR SUPPLIER ADD ATTACHMENT... INT CF TEST TEST	7728	CATALOGNUMBER_DATA ~ 7730	6.6789	50	333.95 USD
					7732
<b>2 TESTING</b> MORE INFO... ● SUPPLIER ONLY FIELDS VALUES DIFFER FROM HEADER VIEW/EDIT COPY TO OTHER LINES MANUFACTURER NAME NAME_DATA CAPITAL EXPENSE ✓ MANUFACTURER CATALOGNUMBER_DATA TAXABLE ✕ PART NUMBER 12-34-56-00 COMMODITY CODE TOOLS UNSPSC REPLENISH STOCK ✕ MORE INFO... PO CLAUSES EDIT CLAUSES SUPP CF ✕ INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENT... EXTERNAL NOTE ATTACHMENTS FOR SUPPLIER ADD ATTACHMENT... INT CF TEST TEST			EACH 6.6789	50 EA	333.95 USD
SUPPLIER SUBTOTAL 667.90 TAX1 0.00 TAX2 0.00 SHIPPING 0.00 HANDLING 0.00 SUPPLIER TOTAL 667.90 USD					
SUBTOTAL 667.90 TAX1 0.00 TAX2 0.00 SHIPPING 0.00 HANDLING 0.00 TOTAL 667.90 USD					

SHIPPING, HANDLING, AND TAX CHARGES ARE CALCULATED AND CHARGED BY EACH SUPPLIER. THE VALUES SHOWN HERE ARE FOR ESTIMATION PURPOSES, BUDGET CHECKING, AND WORKFLOW APPROVALS.

SEE CONFIGURATION FOR THIS REQUISITION  
VIEW CARTS

Figure 77  
(con't)



SciQuest <input type="checkbox"/> PROFILE <input type="checkbox"/> SUMMARY: REQUISITION 107921 SQA NewCart			
HOME   MY FAVORITES   PRODUCT SEARCH   CARTS   APPROVALS   HISTORY   SETTLEMENT   <input type="button" value="GO"/>			
ACTIVE CART   DRAFT CARTS   MY FAVORITES   MY REQUISITIONS   <input type="button" value="ADD NON-CATALOG ITEM"/>			
REQUISITION   <input type="button" value="PR APPROVALS"/>   <input type="button" value="PC PREVIEW"/>   <input type="button" value="HISTORY"/>			
SUMMARY   BILLING DETAILS SECTION   CART DETAILS SECTION   ACCOUNT DETAILS SECTION   SUPPLIER INFO   TAXES/S&H   ?			
HIDE HEADER			
BILLING DETAILS SECTION SHIPPING GROUP CONTACT LINE 1 7810 123 TESTING WAY RALEIGH, NC 27609 UNITED STATES BILLING GROUP 7812 <input checked="" type="checkbox"/> REQUIRED FIELD CREDIT CARD GROUP 7814 PAYMENT INFORMATION WILL BE OBTAINED FROM THE SUPPLIER CONFIGURATION DELIVERY DETAILS REQ DELIVERY SHIP VIA BEST CARRIER-BEST WAY ATTACHMENTS COMMON FOR ALL SUPPLIERS ADD ATTACHMENT... NOTE TO ALL SUPPLIERS PO CLAUSES 9876 PO CONSULTING AGREEMENT 6578 RENNELAER CHECK FULL 0123 KRZ 8.1 TESTING VIEW ALL CLAUSES - (6) VIEW/EDIT BY LINE ITEM...	? EDIT CART DETAILS SECTION CART GROUP 7816 CART NAME DESCRIPTION CART SOURCE CART SOURCE PRIORITY EXPEDIA 5.2 BUDGET APPROVAL DETAILS PREPARED BY 7818 PREPARED FOR VIEW/EDIT BY LINE ITEM...	? EDIT ACCOUNT DETAILS SECTION SPLITTABLE CUSTOM FIELD GROUP 7820 DEPARTMENT CODE ACCOUNT CODE PROJECT CODE TEST VALUE 1 TEST VALUE 2 TEST PROJECT 1 FOR TESTING FOR TESTING PROJECTS ACCOUNTING 7822 ACCOUNTING DATE INTERNAL ATTACHMENTS 7824 ADD ATTACHMENT... INTERNAL NOTE PRWF PQWF CK TEST FIELD YES(I) YES(ONE) x VIEW/EDIT BY LINE ITEM...	? EDIT HIDE VALUE DESCRIPTIONS

TO FIGURE 78 (cont)

Figure 78

FROM FIGURE 78

HIDE LINE DETAILS

MOVE PRODUCTS MORE INFO...  
FULFILLMENT ADDRESS 1   
123 TESTING WAY, DAFFY, RALEIGH, NC 27609 US

ADD NON-CATALOG ITEM FOR THIS SUPPLIER...

SUPPLIER / LINE ITEM DETAILS

FOR SELECTED LINE ITEMS

PO NUMBER  
CONTRACT  
ACCOUNT CODE  
QUOTE NUMBER  
PRICING CODE  
PO CLAUSES

TO BE ASSIGNED

PRODUCT DESCRIPTION	CATALOG NO	SIZE / PACKAGE	UNIT PRICE	QUANTITY	EXT. PRICE
DESCRIPTION_DATA_MORE INFO 7828 MANUFACTURER NAME NAME_DATA MANUFACTURER PART NUMBER CATALOGNUMBER_DATA UNSPSC UN-SP-SC-D MORE INFO...	CAPITAL EXPENSE ✓ TAXABLE × COMMODITY CODE REPLENISH STOCK × DHS PO CLAUSES SUPP CF ×	7830 7832	5.00	5	25.00 USD
INTERNAL NOTE INTERNAL ATTACHMENTS ADD ATTACHMENT... EXTERNAL NOTE ATTACHMENTS FOR SUPPLIER ADD ATTACHMENT... INT CF TEST TEST					
SUPPLIER SUBTOTAL 25.00					
TAX1 0.00					
TAX2 0.00					
SHIPPING 15.00					
HANDLING 1.00					
SUPPLIER TOTAL 41.00 USD					
SUBTOTAL 25.00					
TAX1 0.00					
TAX2 0.00					
SHIPPING 15.00					
HANDLING 1.00					
TOTAL 41.00 USD					

SHIPPING, HANDLING, AND TAX CHARGES ARE CALCULATED AND CHARGED BY EACH SUPPLIER. THE VALUES SHOWN HERE ARE FOR ESTIMATION PURPOSES, BUDGET CHECKING, AND WORKFLOW APPROVALS.

SEE CONFIGURATION FOR THIS REQUISITION  
VIEW CARTS

Figure 78  
(con't)

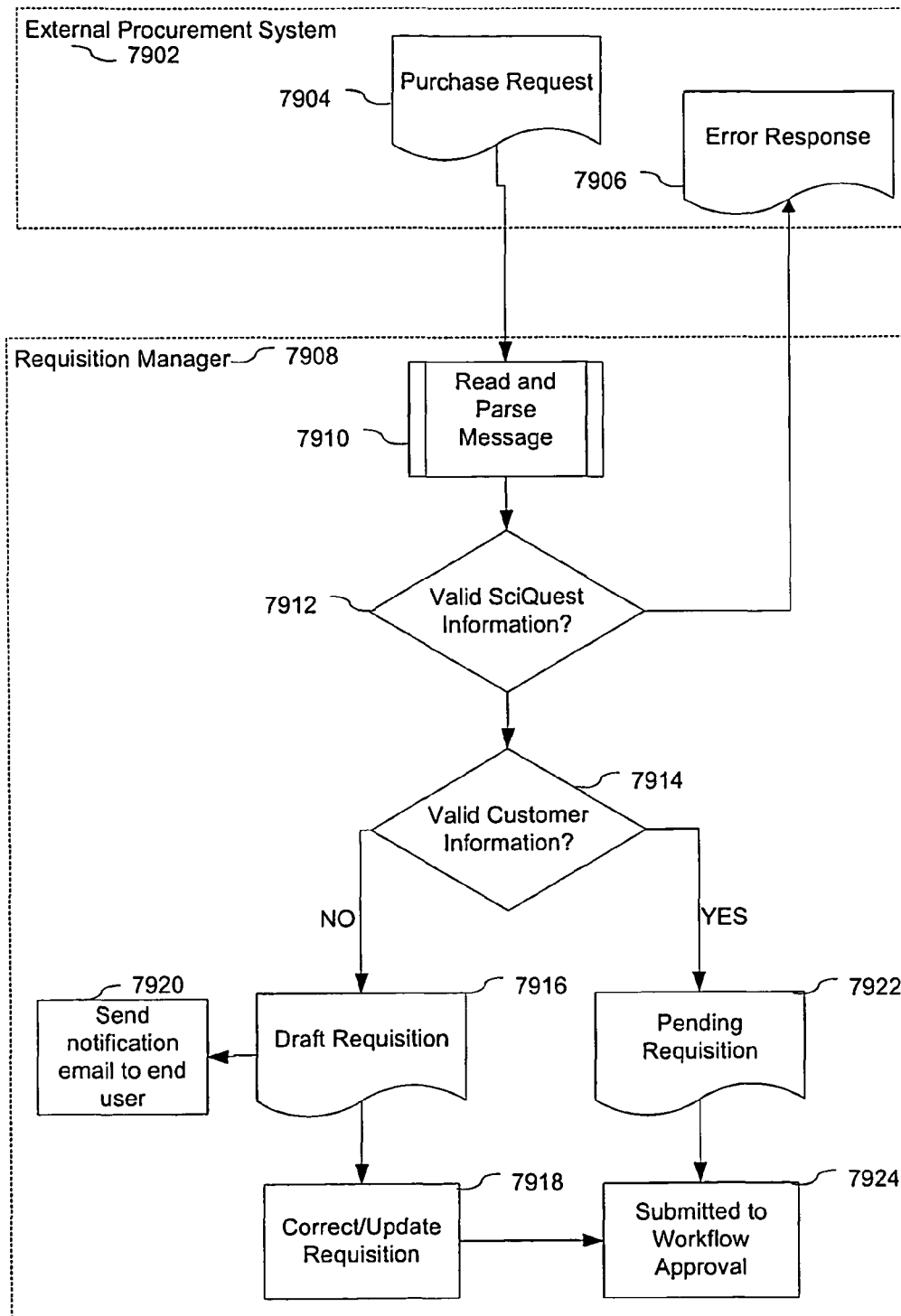


Figure 79

10000

LANGUAGE SELECTION

HOME MY PRODUCT CARTS HISTORY SETTLEMENT ITEM PRICE SALES INVENTORY  
FAVORITES SEARCH

FIELD MGT. FIELD MGT.

NEW SIBLING NEW CHILD

FIELD SELECTION

+HOME / LOGIN

+PRODUCT SEARCH

+MY FAVORITES

MY FAVORITES

ORGANIZATION FAVORITES

MY FORMS

ORGANIZATION FORMS

+ACTIVE FOLDERS

+EDIT FOLDERS

+LEGEND

+ADD TO FAVORITES

+FAVORITE ERRORS

HIDE

FOLDER

HOLD CTRL (WIN) OR APPLE (MAC) KEY TO SELECT MULTIPLE PRODUCTS

-PREVIEW DETAILS LIST

ITEM(S) ADDED TO THE CART

NEW SUB FOLDER

NO PRODUCTS WAS SELECTED FOR VIEW DETAILS. PLEASE SELECT A PRODUCT FROM YOUR FAVORITES LIST

USE FAVORITES TO ORGANIZE ITEMS YOU ORDER FREQUENTLY

+SEARCH TOOLS

SELECTED FIELD FIELD HISTORY

APPLY ALL CHANGES

TYPE

SELECT A LANGUAGE

ENGLISH

ALL

ENGLISH

FRENCH

GERMAN

ITALIAN

POLISH

FIELD

ENGLISH

ALL

ENGLISH

FRENCH

GERMAN

ITALIAN

POLISH

OVERVIEW VALUES

CHARACTERS REMAINING EXPAND CLEAR

2000 CHARACTERS REMAINING EXPAND CLEAR

VISIBLE

REQUIRED

SYSTEM PROTECTED

HIDDEN OBJECT

SAVE

OVERVIEW

DEFAULT

FIG. 80

**FIELD MANAGEMENT**

HOME | MY FAVORITES | SEARCH | CARTS | HISTORY | SETTLEMENT | ITEM PRICE | SALES | INVENTORY | FIELD MGT.

FIELD MGT. ?

NEW SIBLING | NEW CHILD | SEARCH ?

+HOME / LOGIN  
-PRODUCT SEARCH  
-MY FAVORITES  
[MY FAVORITES  
ORGANIZATION FAVORITES  
MY FORMS  
ORGANIZATION FORMS  
+ACTIVE FOLDERS  
+EDIT FOLDERS  
+LEGEND  
+ADD TO FAVORITES  
+FAVORITE ERRORS  
HIDE  
FOLDER  
HOLD CTRL (WIN) OR APPLE (MAC) KEY TO SELECT  
MULTIPLE PRODUCTS  
-PREVIEW DETAILS LIST  
ITEM(S) ADDED TO THE CART  
NEW SUB FOLDER  
NO PRODUCT(S) WAS SELECTED FOR VIEW DETAILS.  
PLEASE SELECT A PRODUCT FROM YOUR FAVORITES LIST  
USE FAVORITES TO ORGANIZE ITEMS YOU  
ORDER FREQUENTLY  
+SEARCH TOOLS

SELECTED FIELD | FIELD HISTORY | APPLY ALL CHANGES

TYPE  
SELECT A LANGUAGE  
ENGLISH  
DISPLAY NAME  
HELP TEXT

FIELD  
[ENGLISH]  
PREVIEW SAVED VALUES  
[MY FAVORITES  
1988 CHARACTERS REMAINING  
EXPAND | CLEAR  
2000 CHARACTERS REMAINING  
EXPAND | CLEAR

OVERWRITE  
DEFAULT  
☒  
☒  
☐  
☐

VISIBLE ✓  
REQUIRED ×  
SYSTEM PROTECTED ✓  
HIDDEN OBJECT ×

[SAVE]

**FIG. 80**  
(CONT'D)

INITIAL FAVORITES ENTRY

ACTIVE FOLDERS

EDIT FOLDERS

10100

UNCHECK ALL

FOLDER NAME/PRODUCT NICKNAME

SUPPLIER

CATALOG NO.

QTY.

PRICE ESTIMATE

SELECT

LEGEND ?

DETAILS

ADD TO ACTIVE CART

☒ MY FAVORITES ADD NON-CATALOG ITEM... ☐

2-FLUORO-3-(TRIFLUOROMETHYL) BENZYL ALCOHOL, 96%, 0.25g LANCASTER SYNTHESIS

12306-0.25g

1

9.99 USD

☐

AA CONTRACT TEST-BUFFER ASL, LYSIS BUFFER FOR USE WITH QIAAMP DNA STOOL MINI KIT (CAT NO. 51504), 560 mL QIAGEN, INC.

19082

UNAVAILABLE

AA CONTRACT TEST-CONTRACTED PRODUCT...

VWR SCIENTIFIC PRODUCTS

3384-0448

2

450.00 USD

☐

AA CONTRACT TEST- SECOND CONTRACTED ITEM...

VWR SCIENTIFIC PRODUCTS

CONTRACT-2

1

1,000.00 USD

☐

AIRPORE TAPE SHEETS, MICROPOROUS TAPE SHEETS FOR COVERING 96-WELL BLOCKS: 25 SHEETS PER PACK, AIRPORE MICROPOROUS TAPE SHEETS ARE IDEAL FOR BACTERIAL CULTIVATION IN BLOCKS, AS THEY PROMOTE GAS EXCHANGE DURING CULTURING

FISHER SCIENTIFIC

NC9942890  
CHECK AVAILABILITY...

1

37.00 USD

☐

BENZYLQUISQUALIC ACID

FAVORITE DESCRIPTION WHEN INITIALLY ADDED TO FAVORITES BY

B-1073 1mg

UNAVAILABLE

BOTTLE, DROP-DISPENSING, TEF30ML

16354-320

1

37.99 USD

☐

BUFFER ASL, LYSIS BUFFER FOR USE WITH QIAAMP DNA STOOL MINI KIT (CAT NO. 51504), 560 mL

INDUSTRIES

19082

1

8.88 EUR

☐

CAD- HISPEED PLASMID MAXI KIT (25), FOR ULTRAFAST PURIFICATION OF UP TO 750µg PLASMID OR COSMID DNA

INDUSTRIES

111

1

13.45 USD

☐

HISPEED PLASMID MAXI KIT (25), FOR ULTRAFAST PURIFICATION OF UP TO 750µg PLASMID OR COSMID DNA

INDUSTRIES

111

1

13.45 USD

☐

FIG. 81

PRODUCT DISCONTINUED

HOME

MY FAVORITES

PRODUCT SEARCH

CARTS

HISTORY

SETTLEMENT

ITEM/PRICE

SALES ORDERS

INVENTORY MANAGEMENT

MORE>>

DASHBOARD

SEARCH SUBMISSIONS

SUBMIT DATA

ITEMS

PRICE SETS

EXTRACTS

CONFIGURATION

ATTRIBUTE SEARCH

?

+ CLICK FOR ITEM MASTER SEARCH

RESULTS FOR: INDUSTRIES +BUFFER +ASL

SHOW ITEM DETAILS

RESULTS PER PAGE 30

RESULTS FOUND FOR YOUR SEARCH: 1

FOR THE SELECTED ITEM

CREATE NEW ITEM

MARK AS DISCONTINUED

MARK FOR DELETION

MARK AS DISCONTINUED

CT

SYNDICATE

REACTIVATE

NO

EA

560mL

100

INDUSTRIES

BUFFERS

19082

BUFFER ASL LYSIS BUFFER FOR USE WITH QIAAMP DNA STOOL MINI KIT (CAT NO. 51504), 560mL

FIG.<sup>81</sup>  
(CONT'D-1)

ACTIVE FOLDERS		EDIT FOLDERS		UPDATED FAVORITES		LEGEND	
[UNCHECK ALL]				[DETAILS]		[ADD TO ACTIVE CART]	
FOLDER NAME/ PRODUCT NICKNAME	SUPPLIER	CATALOG NO.	QTY.	PRICE ESTIMATE	SELECT		
<input checked="" type="checkbox"/> MY FAVORITES    ADD NON-CATALOG ITEM... <input type="checkbox"/>							
2-FLUORO-3-(TRIFLUOROMETHYL) BENZYL ALCOHOL, 96%, 0.25g	LANCASTER SYNTHESIS	12306-0.25g	1	9.99 USD	<input type="checkbox"/>		
AA CONTRACT TEST-BUFFER ASL, LYSIS BUFFER FOR USE WITH QIAAMP DNA STOOL MINI KIT (CAT NO. 51504), 560 mL	QIAGEN, INC.	19082	UNAVAILABLE		<input type="checkbox"/>		
AA CONTRACT TEST-CONTRACTED PRODUCT...	VWR SCIENTIFIC PRODUCTS	3384-0448	2	450.00 USD	<input type="checkbox"/>		
AA CONTRACT TEST- SECOND CONTRACTED ITEM...	VWR SCIENTIFIC PRODUCTS	CONTRACT-2	1	1,000.00 USD	<input type="checkbox"/>		
AIRPORE TAPE SHEETS, MICROPOROUS TAPE SHEETS FOR COVERING 96-WELL BLOCKS; 25 SHEETS PER PACK, AIRPORE MICROPOROUS TAPE SHEETS ARE IDEAL FOR BACTERIAL CULTIVATION IN BLOCKS, AS THEY PROMOTE GAS EXCHANGE DURING CULTURING	FISHER SCIENTIFIC	NC9942890	1	37.00 USD	<input type="checkbox"/>		
		CHECK AVAILABILITY...					
BENZYLQUISQUALIC ACID	A.G. SCIENTIFIC	B-1073 1mg	UNAVAILABLE		<input type="checkbox"/>		
BOTTLE, DROP-DISPENSING, TEF30ML	VWR INTERNATIONAL	16354-320	1	37.99 USD	<input type="checkbox"/>		
BUFFER ASL, LYSIS BUFFER FOR USE WITH QIAAMP DNA STOOL MINI KIT (CAT NO. 51504), 560 mL	INDUSTRIES	19082	UNAVAILABLE		<input type="checkbox"/>		
CAD- HISPEED PLASMID MAXI KIT (25), FOR ULTRAFAST PURIFICATION OF UP TO 750µg PLASMID OR COSMID DNA	INDUSTRIES	111	1	13.45 USD	<input type="checkbox"/>		
HISPEED PLASMID MAXI KIT (25), FOR ULTRAFAST PURIFICATION OF UP TO 750µg PLASMID OR COSMID DNA	INDUSTRIES	111	1	13.45 USD	<input type="checkbox"/>		

FIG. 81

(CONT'D-2)



10200

10200

HOME MY FAVORITES PRODUCT SEARCH CENTS HISTORY SETTLEMENT ITEM PRICE SALES INVENTORY MORE>> (X) (Z)

ACTIVE CART DRAFT CARTS MY FAVORITES MY REQUISITIONS ?

CREATE CART ADD PRODUCTS EDIT CART REVIEW PLACE ORDER OR ASSIGN CART

ADD NON-CATALOG ITEM PR APPROVALS PO PREVIEW HISTORY

SUMMARY GENERAL SHIP TO BILL TO DELIVERY CODES SUPPLIER INFO TAXES&H

HIDE HEADER

HIDE VALUE DESCRIPTIONS

GENERAL	INTERNAL INFO	SUPPLIER INFO
CART NAME	INTERNAL INFO	SUPPLIER INFO
PRIORITY	PRWF	POWF
DESCRIPTION	YES	NO
PREPARED BY	YES	NO
PREPARED FOR	INTERNAL NOTE	NOTE TO ALL SUPPLIERS
	INTERNAL ATTACHMENTS ADD ATTACHMENT...	ACCOUNTING DATA
	HEADER LEVEL ATTACHMENTS	ATTACHMENTS FOR ALL SUPPLIERS
		ADD ATTACHMENT...
VIEW/EDIT BY LINE ITEM...		
SHIP TO	BILL TO	DELIVERY
SHIPPING ADDRESS	BILL TO	DELIVERY
ATTN: RADIOACTIVE SAFETY OFFICER	USER:	EXPEDITE
1111 MAIN STREET	ACCOUNTS PAYABLE	SHIP VIA
RADIOACTIVE DELIVERY DOCK	MORRISVILLE, NC 27560	BEST CARRIER-BEST WAY
MORRISVILLE, NC 27560	UNITED STATES	REQ DELIVERY
UNITED STATES	CREDIT CARD	5/30
VIEW/EDIT BY LINE ITEM...	VIEW/EDIT BY LINE ITEM...	VIEW/EDIT BY LINE ITEM...

FIG. 82

HIDE LINE DETAILS		SUPPLIER / LINE ITEM DETAILS		ADD TO FAVORITES		GO														
		FOR SELECTED LINE ITEMS																		
<div style="display: flex; justify-content: space-between;"> <div> <p>LANCASTER SYNTHESIS <span style="border: 1px solid black; padding: 0 2px;">3</span> MORE INFO...</p> </div> <div style="border: 1px solid black; padding: 5px; width: 150px;"> <p style="text-align: center; margin: 0;">EDIT</p> <p>TO BE ASSIGNED BASED ON THE SUPPLIER SETTINGS (BLANKET PO)</p> </div> </div>																				
<div style="display: flex; justify-content: space-between;"> <div> <p>CONTRACT</p> <p>PO NUMBER</p> <p>PRICING CODE</p> <p>QUOTE #1</p> <p>PO CLAUSES</p> </div> <div> <p>VIEW/EDIT BY LINE ITEM...</p> </div> </div>																				
ADD NON-CATALOG ITEM FOR THIS SUPPLIER																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 40%;">PRODUCT DESCRIPTION</th> <th style="width: 15%;">CATALOG NO</th> <th style="width: 15%;">SIZE/PACKAGING</th> <th style="width: 10%;">UNIT PRICE</th> <th style="width: 10%;">QUANTITY</th> <th style="width: 10%;">EXT. PRICE</th> <th style="width: 10%; text-align: right;">EDIT</th> </tr> </thead> <tbody> <tr> <td>1 2-FLUORO-3-(TRIFLUOROMETHYL) BENZYL ALCOHOL, 96%, 0.25g MORE INFO...</td> <td>12306-0.25g</td> <td>0.25g EA</td> <td>9.99</td> <td>1 EA</td> <td>9.99 USD</td> <td style="text-align: right;">EDIT</td> </tr> </tbody> </table>							PRODUCT DESCRIPTION	CATALOG NO	SIZE/PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE	EDIT	1 2-FLUORO-3-(TRIFLUOROMETHYL) BENZYL ALCOHOL, 96%, 0.25g MORE INFO...	12306-0.25g	0.25g EA	9.99	1 EA	9.99 USD	EDIT
PRODUCT DESCRIPTION	CATALOG NO	SIZE/PACKAGING	UNIT PRICE	QUANTITY	EXT. PRICE	EDIT														
1 2-FLUORO-3-(TRIFLUOROMETHYL) BENZYL ALCOHOL, 96%, 0.25g MORE INFO...	12306-0.25g	0.25g EA	9.99	1 EA	9.99 USD	EDIT														
<div style="display: flex; justify-content: space-between;"> <div> <p>SUPPLIER SPECIFIC ATTACHMENTS</p> <div style="display: flex; justify-content: space-between; width: 100%;"> <div style="width: 45%;"> <p>MOLECULAR FORMULA <chem>C8H6F4O</chem></p> <p>UNSPSC 12-35-00-00</p> <p>MORE INFO</p> </div> <div style="width: 50%;"> <p>TAXABLE <input checked="" type="checkbox"/></p> <p>CAPITAL EXPENSE <input checked="" type="checkbox"/></p> <p>COMMODITY CODE <input checked="" type="checkbox"/></p> <p>REPLENISH STOCK <input checked="" type="checkbox"/></p> </div> </div> </div> <div> <p>EXTERNAL NOTE</p> <div style="border: 1px solid black; padding: 5px; width: 150px;"> <p>ATTACHMENTS FOR SUPPLIER</p> <p>ADD ATTACHMENT</p> </div> </div> </div>																				
<table style="width: 100%;"> <tbody> <tr> <td style="width: 60%;">SUPPLIER SUBTOTAL</td> <td style="text-align: right;">9.99</td> </tr> <tr> <td>TAX 1</td> <td style="text-align: right;">1.00</td> </tr> <tr> <td>TAX 2</td> <td style="text-align: right;">0.50</td> </tr> <tr> <td>SHIPPING</td> <td style="text-align: right;">20.00</td> </tr> <tr> <td>HANDLING</td> <td style="text-align: right;">30.00</td> </tr> <tr> <td>SUPPLIER TOTAL</td> <td style="text-align: right;">61.49 USD</td> </tr> </tbody> </table>							SUPPLIER SUBTOTAL	9.99	TAX 1	1.00	TAX 2	0.50	SHIPPING	20.00	HANDLING	30.00	SUPPLIER TOTAL	61.49 USD		
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TAX 2	0.50																			
SHIPPING	20.00																			
HANDLING	30.00																			
SUPPLIER TOTAL	61.49 USD																			

**FIG.** <sup>82</sup>  
(CONT'D)

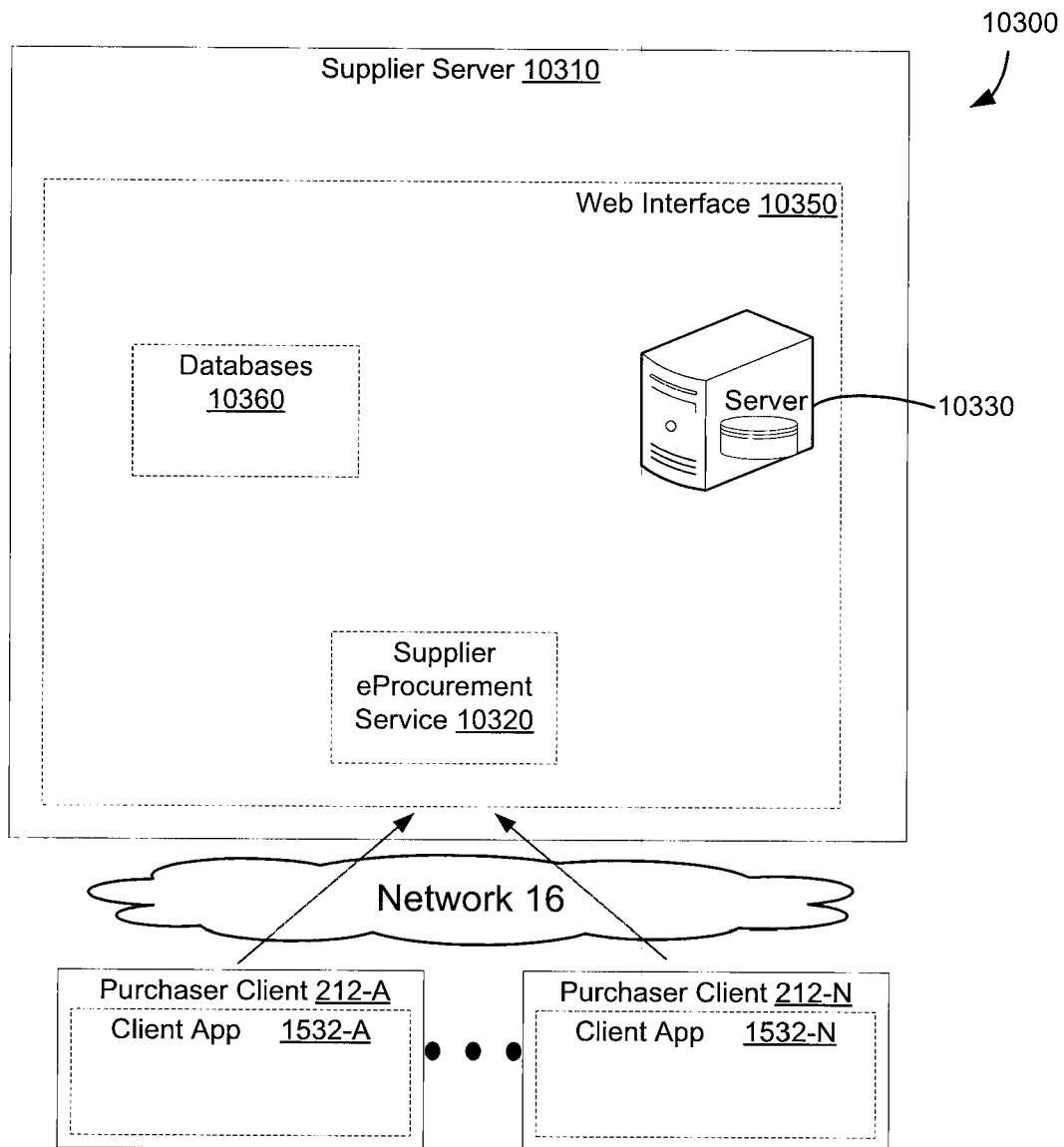


Figure 83

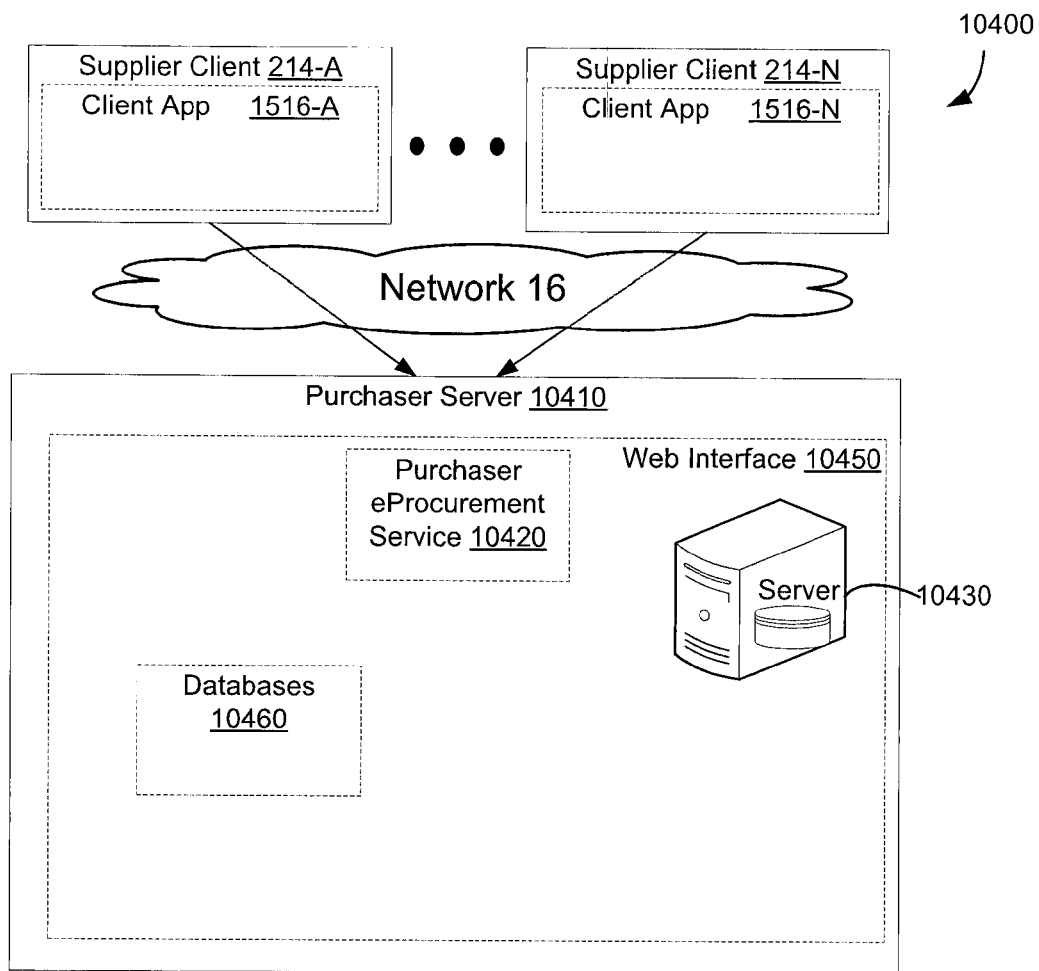


Figure 84

# METHOD, MEDIUM, AND SYSTEM FOR PURCHASE REQUISITION IMPORTATION

## RELATED APPLICATIONS

This application is a continuation-in-part of U.S. patent application Ser. No. 12/283,274, "Workflow and Material Management in an Electronic Procurement System" filed on Sep. 9, 2008, which is hereby incorporated entirely herein by reference.

This application claims the benefit and priority of U.S. Provisional Patent Application Ser. No. 61/130,028, filed on May 27, 2008, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 10/318,814, filed Dec. 13, 2002, now U.S. Pat. No. 6,944, 613 entitled "Method and System for Creating a Database and Searching the Database for Allowing Multiple Customized Views, issued on Sep. 13, 2005, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,276, "Taxonomy and Data Structure for an Electronic Procurement System" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,275, "Shopping Cart Management in an Electronic Procurement System" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,279, "Multi-Currency Normalization In An Electronic Procurement System" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,280, "Form Management In An Electronic Procurement System" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,277, "Identifying and Resolving Discrepancies Between Purchase Documents and Invoices" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,278, "Providing Substitute Items When An Ordered Item Is Unavailable" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,281, "Prioritizing Order And Receipt Of Items Between Users" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. patent application Ser. No. 12/283,282, "Invoice Workflow" filed on Sep. 9, 2008, which is hereby incorporated entirely herein by reference.

This application is related to U.S. Provisional patent application Ser. No. 12/286,508, "Multi-Constituent Attribution of a Vendor's Product Catalog" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

This application is related to U.S. Provisional patent application Ser. No. 12/286,506, "SKU Based Contract Management in an Electronic Procurement System" filed on the same date as this application, which is hereby incorporated entirely herein by reference.

## FIELD OF INVENTION

The present invention relates generally to the field of procurement and, in particular, to a system and method for customized searching, procurement, data modeling, and order processing over a network using a single instance system that supports multi-tenants in a multi-business to multi-consumer type environment.

## BACKGROUND OF INVENTION

Current e-commerce systems and methods provide consumers and businesses with the ability to browse product lines and consummate sales transactions. However, current e-commerce systems do not allow for easy customization of the needed functionality to facilitate the transaction. While current systems can be customized for a specific business or customer, the customization is a time consuming and complicated task. These customizations must generally be hard coded into the application by the developers, thereby incurring increases in costs, delay in implementation, and loss of productivity. In the field of procurement, for example, an organization in need of a product or service generally has contractual relationships with multiple vendors to provide the desired product or service. The contractual relationship may define such terms as price, lot size, form of delivery, amount of discount, and other business rules. These rules may become complex as one term may influence other terms, such as different levels of discounts based on the number of items ordered.

Procurement systems also generally require order authorization from a procurement officer of the organization or someone in charge of reviewing the orders for compliance with internal policies of the organization, in addition to the contractual relationships with the vendors. These orders must be processed and tracked as the orders progress through the approval process such that the individuals placing orders are notified of whether the order was approved or denied, as well as for internal audit purposes. Therefore, there is a need for a system and method that can provide an efficient and simple procurement process that is easily customizable for multiple organizations and multiple vendors with simple and complex business terms, and can also provide a single point-of-access for both businesses and consumers to interface, interact, and implement and execute transactions, in accordance with existing or newly defined relationships, using a custom and configurable methodology for realizing their requirements.

## SUMMARY OF THE INVENTION

Accordingly, the present invention is directed to a procurement system and method over a network using a single instance multi-tenant architecture that substantially obviates one or more problems due to limitations and disadvantages of the related art.

A server system and associated method and computer readable storage medium for an electronic procurement system is described, wherein the electronic procurement system supports importing of purchase requisitions. In response to one or more user commands to the electronic procurement system, the server receives a purchase requisition, where the purchase requisition originates from outside of the electronic procurement system. The purchase requisition is converted from a first format to a second format, wherein the second format is native to the electronic procurement system. The server verifies that the converted purchase requisition is consistent with business rules associated with the electronic procurement

system. The business rules include at least a rule to verify that the purchase requisition originates from a recognized user of the electronic procurement system. The purchase requisition is then routed for approval.

In some embodiments, edits by a user are received at the electronic procurement system and the purchase requisition is updated with the edits. In some embodiments, the server verifies that the updated purchase requisition is consistent with the business rules. In some embodiments, a user associated with the purchaser requisition is prevented from editing the purchase requisition after it has been received by the server hosting the electronic procurement system.

In some embodiments, after receiving the purchase requisition, the server verifies that required information is present, and if not, saves the purchase requisition in the electronic procurement system and notifies a user associated with the purchaser requisition that the required information is missing. In some embodiments, the required information is specified by a purchasing organization associated with the purchase requisition. In some embodiments, the required information is a next approver associated with a user submitting the purchaser requisition. In some embodiments, after receiving the purchase requisition, the server verifies that a purchaser required information is associated with the purchase requisition, and if not, notifies a sender of the purchase requisition that the purchase requisition is refused.

In some embodiments, after receiving the purchase requisition, the server verifies that a user identifier and at least one line item are associated with the purchase requisition, and if not, notifies a sender of the purchase requisition that the purchase requisition is refused. In some embodiments, converting the purchase requisition includes importing an attachment associated with the purchase requisition into the electronic procurement system. In some embodiments, the second format native to the electronic procurement system is an Extensible Markup Language.

In some embodiments, converting the purchase requisition includes identifying a respective restricted item in the purchase requisition and applying a respective restriction to the purchase requisition, in accordance with business rules. In some embodiments, a restriction override request is identified in the purchase requisition for a respective restricted item. In some embodiments, a form associated with the purchase requisition is identified and data is mapped from the purchase requisition into the form, and the mapped form data is stored at the electronic procurement system. In some embodiments, a plurality of purchase requisitions is imported in a single operation. In some embodiments, a user or purchaser is prevented from re-ordering an item based on a purchase requisition (i.e., no refills of the purchase requisition) so that a separate purchase requisition must be submitted for each order.

In some embodiments, the purchase requisition is identified as an imported requisition. In some embodiments, the purchase requisition is routed to an approval process for imported requisitions, separate from a process for requisitions non-imported requisitions. Non-imported requisitions includes requisitions originating from within the electronic procurement system. In some embodiments, a requisition identifier associated with a user submitting a purchase requisition is identified and stored at the electronic procurement system, and the requisition identifier may be used to search the electronic procurement system by the requisition identifier. In some embodiments, a plurality of bids are received for the verified purchase requisition, a user bid is received, selected from the plurality of bids, and the purchase requisition

is updated with the user selected bid, prior to routing the purchase requisition for approval.

Additional features and advantages of the invention will be set forth in the description which follows, and in part will be apparent from the description, or may be learned by practice of the invention. The objectives and other advantages of the invention will be realized and attained by the structure particularly pointed out in the written description and claims hereof as well as the appended drawings.

It is to be understood that both the foregoing general description and the following detailed description are exemplary and explanatory and are intended to provide further explanation of the invention as claimed.

#### BRIEF DESCRIPTION OF THE DRAWINGS

The accompanying drawings, which are included to provide a further understanding of the invention and are incorporated in and constitute a part of the specification, illustrate embodiments of the invention and together with the description serve to explain the principles of the invention. In the drawings:

FIG. 1 is a block diagram illustrating an exemplary embodiment of an eProcurement system in accordance with the present invention;

FIG. 2 illustrates an exemplary embodiment of an eProcurement architecture in accordance with the present invention;

FIG. 3 illustrates an exemplary user interface in accordance with the present invention.

FIGS. 4A-4T illustrate exemplary user management tools in accordance with the present invention;

FIG. 5A illustrates an exemplary user setting tool in accordance with the present invention;

FIG. 5B illustrates an exemplary roles selection tool in accordance with the present invention;

FIG. 5C illustrates an exemplary email preference tool in accordance with the present invention;

FIG. 5D illustrates an exemplary navigation setup tool in accordance with the present invention;

FIG. 5E illustrates an exemplary user purchasing tool in accordance with the present invention;

FIG. 5F illustrates an exemplary punch-out access tool in accordance with the present invention;

FIGS. 5G-5M illustrate exemplary user permission tools in accordance with the present invention;

FIGS. 5N-5O illustrate exemplary materials management tools in accordance with the present invention;

FIGS. 6A-6J illustrate exemplary organization setup tools in accordance with the present invention;

FIG. 7 illustrates an exemplary workflow setup tool in accordance with the present invention;

FIGS. 8A-8D illustrate exemplary search engines in accordance with the present invention;

FIGS. 9A-9F illustrate exemplary catalog management tools in accordance with the present invention;

FIG. 10 illustrates an exemplary contracts management tool in accordance with the present invention;

FIGS. 11A-D illustrates an exemplary cart and requisition tool in accordance with the present invention;

FIG. 12 illustrates an exemplary workflow setup tool in accordance with the present invention;

FIG. 13 illustrates an exemplary purchase order approval tool in accordance with the present invention; and

FIG. 14 illustrates an exemplary history tool in accordance with the present invention.

FIG. 15 illustrates the electronic procurement system communicating over a network with suppliers and purchasing organizations.

FIG. 16 illustrates the purchasing organization client communicating over a network with the purchaser server application to access the engines of the purchaser server application.

FIG. 17 illustrates the supplier client communicating over a network with the supplier server application to access the engines of the supplier server application.

FIG. 18 illustrates the features and database accessible via the supplier client.

FIG. 19 illustrates the features and database accessible via the purchasing organization client.

FIG. 20 illustrates a server system hosting an electronic procurement system running on the server.

FIG. 21 illustrates a client system providing access to an electronic procurement system running on a server.

FIG. 22 illustrates a top-level data structure for electronic procurement system.

FIG. 23 illustrates a data structure for a master database, showing contents of a forms database.

FIG. 24 illustrates a data structure for a master database, showing contents of a catalog database and search database for indexing the master database.

FIG. 25 illustrates a data structure for a transaction database, showing contents of a purchase order database.

FIG. 26 illustrates a data structure for a transaction database, showing contents of a fax, distribution and revisions databases.

FIG. 27 illustrates a data structure for a transaction database, showing contents of a requisition database.

FIG. 28 illustrates a data structure for a transaction database, showing contents of a receipt database.

FIG. 29 illustrates a data structure for a transaction database, showing contents of a sales order database.

FIG. 30 illustrates a data structure for a transaction database, showing contents of a workflow database.

FIG. 31 illustrates a data structure for a staging database, showing contents of a staging catalog database.

FIG. 32 illustrates a data structure for a transaction database, showing contents of a contracts database.

FIG. 33 illustrates a data structure for a transaction database, showing contents of a buyer invoice database.

FIG. 34 illustrates a data structure for a transaction database, showing contents of a seller invoice database.

FIG. 35 illustrates a data structure for an end user database, showing contents of a user/security database.

FIG. 36 illustrates a data structure for a scheduler database, showing contents of the scheduler database.

FIG. 37 illustrates a prophetic block diagram of a server system, according to some embodiments.

FIG. 38 illustrates a prophetic block diagram of a server system, according to some embodiments.

FIG. 39 illustrates a prophetic block diagram of a process flow implemented at a server system, according to some embodiments.

FIG. 40 illustrates a prophetic block diagram of an e-procurement process flow implemented at a server system, according to some embodiments.

FIG. 41 illustrates an exemplary data structure 4100 for an inventory of an item, according to some embodiments.

FIG. 42 illustrates a prophetic block diagram of a process flow, implemented at a server system, according to some embodiments.

FIG. 43 illustrates an exemplary screenshot of a workflow configuration user interface, according to some embodiments.

FIG. 44 illustrates an exemplary screenshot of an advanced dynamic workflow setup rule group menu, according to some embodiments.

FIG. 45 illustrates an exemplary screenshot of a rules management setup menu, according to some embodiments.

FIG. 46 illustrates an exemplary screenshot of an assign rule to group menu, according to some embodiments.

FIG. 47 illustrates an exemplary screenshot of an import/export rules group menu, according to some embodiments.

FIG. 48 illustrates an exemplary screenshot of an item setup menu within a supplies manager application, according to some embodiments.

FIG. 49A illustrates an exemplary screenshot of a setup inventory attributes menu, according to some embodiments.

FIG. 49B illustrates an exemplary screenshot of an item setup pricing menu, according to some embodiments.

FIG. 49C illustrates an exemplary screenshot of an item setup replenishment link menu, according to some embodiments.

FIG. 50 illustrates an exemplary screenshot of a supplier setup inventory parameters menu, according to some embodiments.

FIG. 51 illustrates an exemplary screenshot of a search results menu, according to some embodiments.

FIG. 52 illustrates an exemplary screenshot of a shopping cart menu, according to some embodiments.

FIG. 53 illustrates an exemplary screenshot of a sales order queue, according to some embodiments.

FIG. 54 illustrates an exemplary screenshot of a picking/packing slip, according to some embodiments.

FIG. 55 illustrates an exemplary screenshot of a purchase order status/acknowledgement, according to some embodiments.

FIG. 56 illustrates an exemplary screenshot of a replenishment report, according to some embodiments.

FIG. 57 illustrates an exemplary screenshot of a replenishment order, according to some embodiments.

FIG. 58A illustrates an exemplary screenshot of a replenishment receipt, according to some embodiments.

FIG. 58B illustrates an exemplary screenshot of a replenishment allocation, according to some embodiments.

FIG. 59A illustrates an exemplary screenshot of a setup folders/automated robots screen, according to some embodiments.

FIG. 59B illustrates an exemplary screenshot of a setup workflow process screen, according to some embodiments.

FIG. 59C illustrates an exemplary screenshot of an assign approvers screen, according to some embodiments.

FIG. 59D illustrates an exemplary screenshot of a review required approvals screen, according to some embodiments.

FIG. 59E illustrates an exemplary screenshot of a review invoices requiring approval screen, according to some embodiments.

FIG. 60 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 61 illustrates a flowchart continuing the flowchart of FIG. 60, according to some embodiments.

FIG. 62 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 63 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

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FIG. 64 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 65 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 66 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 67 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 68 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 69 illustrates a prophetic block diagram of a server system, including an eProcurement provider hosted at the server system, according to some embodiments.

FIG. 70 illustrates a prophetic block diagram of an eProcurement system hosted at a supplier server, according to some embodiments.

FIG. 71 illustrates a prophetic block diagram of an eProcurement system hosted at a purchaser server, according to some embodiments.

FIG. 72 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 73 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 74 illustrates a flowchart representing a server method for hosting an eProcurement system, according to some embodiments.

FIG. 75 illustrates a listing of exemplary folders and robots, according to some embodiments.

FIGS. 76 A-C illustrate a flowchart representing a server method for hosting an eProcurement system and for importing a purchase requisition, according to some embodiments.

FIG. 77 illustrates an exemplary screenshot of an imported purchase requisition, according to some embodiments.

FIG. 78 illustrates an exemplary screenshot of an imported purchase requisition highlighting required fields, according to some embodiments.

FIG. 79 illustrates a flowchart representing a server method for importing a purchase requisition and for reporting a status, according to some embodiments.

FIG. 80 illustrates an exemplary field management interface in accordance with the present invention.

FIG. 81 illustrates an exemplary update favorite(s) process flow in accordance with the present invention.

FIG. 82 illustrates an exemplary document setup interface in accordance with the present invention.

FIG. 83 illustrates an electronic procurement system hosted at a supplier server.

FIG. 84 illustrates an electronic procurement system hosted at a purchaser server.

#### DETAILED DESCRIPTION

Purchasing organizations, particularly institutional organizations, frequently have their own established purchasing procedure and software framework. The established software framework is often developed over time using a variety of software packages or custom software. This 'homegrown' system may be difficult to interface with other procurement systems, and may also be difficult to interface with suppliers' systems.

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An integrated system, method, and computer readable storage medium for importing purchase requisitions from purchasing organizations is described. This integrated system may receive and import purchase requisitions in draft form (where some information is missing), or in submitted form (where all information is present and the requisition is ready for processing). The integrated system may communicate securely with the purchasing organization via secure communications. The secure communication may include data described using XML or other file formats.

This integrated system allows a purchasing organization to aggregate all of its spending regardless of where the original requisitions were created. The aggregated spending may be tracked in one system and used for accounting and budget validation, common workflow approvals, aggregation of spending for analysis and contract-negotiation, etc.

This integrated system also enables the use of a third party sourcing system. The sourcing system creates and executes request for proposal, request for information, and request for quotation processes to obtain information and bids from multiple vendors. This information allows a purchaser to make strategic decisions related to which vendor to use, and to whom the purchase requisition or purchase order should be sent. As part of the purchasing process, the selected bid or bids may require workflow validation or other validation before a purchase requisition or purchase order is submitted. By using a requisition import capability, a purchasing organization may link its sourcing tools and processes to its electronic procurement system.

This integrated system reduces the problem of lack of visibility into spending for the purchasing department, i.e., knowing what is being purchased at what price, by whom, and when. Without this visibility, purchasing departments cannot use the aggregated spending information to negotiate better contracts for the purchasing organization, or to identify preferred suppliers and rates. The integration prevents purchase requisitions outside of the purchasing organization's system (i.e., in "shadow" systems), where they would not be validated for accounting, budgeting, and authorization purposes.

Reference will now be made in detail to embodiments, examples of which are illustrated in the accompanying drawings. In the following detailed description, numerous non-limiting specific details are set forth in order to assist in understanding the subject matter presented herein. It will be apparent, however, to one of ordinary skill in the art that various alternatives may be used without departing from the scope of the present invention and the subject matter may be practiced without these specific details. For example, it will be apparent to one of ordinary skill in the art that the subject matter presented herein can be implemented on any type of client-server compatible system containing any type of client, network, server, and database elements.

The terms module, engine, and application are used interchangeably herein.

FIG. 1 is a block diagram illustrating an exemplary embodiment of an eProcurement system in accordance with the present invention. The term "eProcurement architecture" used herein refers to a system and method that facilitates customized searching, data modeling, and order processing over an electronic network, using a client-server type architecture, where multi-tenants (e.g., end users/consumers, supplier users, etc.) can realize each of their specific business requirements with respect to the process of initiating and consummating transactions. In general, the eProcurement architecture of the present invention facilitates transactions between end users and suppliers. The end users may be individual users or members of an organization, such as a com-



pany or institution. For example, the end users may be any member of the organization authorized for performing procurement operations for the organization or the end user may be an individual of a sole proprietorship.

In a multi-person organization, procurement operations of the organization are setup in a multi-level structure with a group of individuals who make requests for requisitions and an authorizing entity (e.g., manager) who approve such requests based on the organization's procurement policies. There may be a plurality of individuals assigned as the authorizing entity, and the authorizing entity may itself include multiple levels of authority with each higher level having more control over the procurement operations. The procurement policies may define the levels of authority, such as who can order what, and include one or more contractual relationships between the organization and one or more suppliers. By way of example only, the procurement policy may define that the lowest level end user of a particular department can only order certain products or services while a higher level end user can order or authorize orders of broader categories of products and/or services. In another example, the procurement policy may require that certain products or services be ordered exclusively from a supplier with an exclusive contract with the organization. As another example, the procurement policy may require that a particular product be ordered in a predetermined lot size due to a contractual discount negotiated from a particular supplier. The eProcurement architecture of the present invention facilitates transactions between multiple end users of any level of any organization with multiple suppliers taking into account the procurement policies associated with each end user and supplier on a single platform (i.e., single instance, multi-tenant architecture).

As shown in FIG. 1, the eProcurement system 10 of the present invention includes end users 12, supplier users 14, and the procurement module 20 connected over a data communications network 16. The procurement module 20 includes access module 21, search engine 22, transaction module 23, business rules engine 24, and data repository 30. The data repository 30 may include one or more databases to store user data 32, hosted product index 34, product data 36, and transaction data 38.

The access module 21 allows the end users and suppliers to set up and gain access to their respective accounts in the eProcurement system 10. For example, the access module 21 may include registration/account setup procedures to create a new account on the eProcurement system 10. The access module 21 may also include authentication procedures (e.g., login ID and password) to determine the identity of the user and the user's profile (e.g., associated organization, level of access, etc.) before granting access to the procurement module 20. Once granted access, the user may configure the account for customized access. If the user is a "super user" (i.e., a user with higher levels of access, such as a procurement supervisor of an organization), the super user may set conditions for access of other users from his organization. If the user is a supplier, the supplier user may create or update the supplier account or provide/update product/service information (e.g., product catalog).

The search engine 22 allows the user to search through the hosted product index 34 to find a product and/or service provided by the one or more suppliers. In general, the search engine 22 searches through the hosted product index 34, which contains tokenized data of all the products from all the suppliers stored in the product database 36. The search results of the search are processed by the business rules engine 24 and displayed to the user based on the business rules set for the user and the user's organization. The search engine 22

includes a punch-out module 22a that allows the user to "punch-out" to an unhosted supplier catalog for products/services not available through the eProcurement system 10. The user can only access those punch-out suppliers configured for him/her according to the business rules engine 24.

The transaction module 23 includes one or more of requisition module 23a, order module 23b, and tracking module 23c to facilitate a transaction with one or more suppliers. The requisition module 23a processes items selected by the user from the search engine 22 and creates a requisition. If authorization is required, the requisition module 23a notifies the designated authorizing entity of the requisition to obtain authorization. If the requisition is denied, the requisition module 23a sends a notification back to the user of the decision. If the requisition is approved, the user is notified and the requisition either a) is sent to order module 23b, or b) is marked as "complete" based on the business rules engine 24 because not all requisitions are necessarily converted to orders. The order module 23b converts the requisition into a purchase order according to the business rules in the business rules engine 24. The order module 23b sends the purchase order to the appropriate supplier in the proper format(s) designated for that supplier. Once the purchase order has been sent, the tracking module 23 receives confirmation of the purchase orders from the suppliers and keeps track of the purchase orders through the fulfillment process.

In general, a user (i.e., end user, super user, supplier user, etc.) gains access to the procurement module 20 through the access module 21. The access module 21 may include security measures, such as authentication (e.g., providing user ID and password), to identify the user by accessing the user data stored in the user database 32. User accounts may also be created through the access module 21. For example, a user (generally a super user) creates an account on the eProcurement system 10 by registering through the access module 21. The account may also be created by a system administrator of the eProcurement system 10 off-line who gives access to the user via emailing a registration link to the access module 21. Once an account has been created, the user may access the eProcurement system 10 through the access module 21.

FIG. 2 illustrates an exemplary embodiment of an eProcurement architecture in accordance with the present invention. As shown in FIG. 2, the eProcurement architecture of the present invention may include one or more end user/consumer interfaces 212 and supplier user interfaces 214, which may connect to one or more servers 220 over a wired or wireless network 216. These one or more servers 220 may be for user processing (e.g., end user processing servers 221), product database hosting (e.g., custom database servers 222), transaction processing (e.g., transaction processing servers 223), middleware/web methods (e.g., middleware/web methods servers (e.g., business rules) 224—e.g., for implementing business rules between end users and supplier users), and communication processing (e.g., web servers 225), such as streaming data/media, file hosting (e.g., FTP—File Transfer Protocol—server), web serving (e.g., HTTP/HTTPS, WWW, CGI—Common Gateway Interface, ASP—Active Server Pages, Servlets, JSP—Java Server Pages, etc.), facsimile transmission, proxy, telnet, chat, list, mail (e.g., SMTP—Simple Mail Transfer Protocol), news (e.g., NNTP—Network News Transfer Protocol), groupware, and other communication/data processing purposes. These one or more servers 220 may be hosted behind or outside a firewall 218 with or without failover and/or load balancers. These one or more servers 220 may be hosted over the Internet, within the same Intranet and/or subnet, on different Intranets and/or subnets, or in any other inter-networked configuration of

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network **216**. The servers **220** may be implemented on Microsoft™ Windows NT/2000/XP™/XP Professional/Server™/Vista™ (e.g., Microsoft™ Internet Information Services (IIS)), Apache, Unix™, z/OS™, z/VM™, Linux™, VMS, Netscape Enterprise Server™, iPlanet™ Web Server, Sun Java System Web Server, Oracle™ Server, SQL Server™ (e.g., Microsoft™, Sybase™, MySQL™ etc.), Terradata server applications, or any other compatible server technology.

End user interfaces **212** and supplier user interfaces **214** may be implemented on Internet web browsers such as Microsoft Internet Explorer™, Netscape Navigator™, Mozilla™ Firefox™, Opera, Satori, Blazer, or any other Internet web browser capable of sending and receiving data using the Hypertext Transfer Protocol (HTTP). The data may be transferred over an encrypted and authenticated communication layer (i.e., using secure HTTP, or as more commonly known, HTTPS). End user interfaces **212** and supplier user interfaces **214** may be implemented using a combination of HTML (Hypertext Markup Language), Macromedia Flash™, XML (Extensible Markup Language), CGI (Client Gateway Interface), ASP (Active Server Pages), JSP™ (JavaServer Pages), PHP (Hypertext Preprocessor), Java, C/C++, Visual Basic™, Visual Basic Script, Perl™, Tcl/Tk, SQL (Structured Query Language), and any other relevant markup/programming/scripting/query language or development environment.

Communication from the end user interfaces **212** and supplier user interfaces **214** to the server or plurality of servers **220**, via the firewall **218** with failover and load balancer, may be implemented over wired communication protocols through network **216**. For example, at the Wide Area Network (WAN) level or at the Local Area Network (LAN) level, routed Internet Protocol (IP) packets may be transported using the IEEE 802.3 Ethernet standard, for example, on the data link network layer. However, any network standard may be used, whether for packet encapsulation, path determination and logical addressing, or physical addressing, at any layer of these layers without departing from the scope of the invention. Also, the packet data may be transported over interconnected hubs (not shown), switches **226**, routers **227**, and other network elements. At the WAN level, protocols such as Packet over Synchronous Optical Network (SONET) or Synchronous Digital Hierarchy (SDH), Asynchronous Transfer Mode (ATM) over SONET, Multi-protocol Label Switching (MPLS), packet over Frame Relay, or other analogous protocols may be used to deliver data over longer distances. Interconnect repeaters, multiplexers (e.g., add/drop), and cross connects may be used to facilitate and ensure accurate transmission over the long-haul from point-to-point.

Communication from the end user interface **212** and supplier user interfaces **214** to the server or plurality of servers **220**, via the firewall **218** with failover and load balancer, may also be implemented over wireless communication protocols over network **216**. For example, at the LAN level (i.e., WiFi), standards such as 802.11a, 802.11b, 802.11g, and 802.11n may be used to deliver data from point-to-point. Similarly, at the Metropolitan Area Network (MAN)/WAN level, standards such as 802.16e (i.e., WirelessMAN), WiMax, Universal Mobile Telecommunications System (UMTS) over Wideband Code Division Multiple Access (W-CDMA), GSM, GPRS, or EDGE may also be used to deliver data from point-to-point. As with the wired networks, other standards and protocols may be used without departing from the scope of the invention.

The eProcurement architecture of the present invention includes a data repository **230**. The data repository **230** may

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be implemented using one or more databases to store end user data **232**, hosted product index **234**, master product data **236**, and transaction data **238**, in accordance with business rules (implemented via, for example, a business rules engine **24**). The data repository **230** may be implemented using any type of data storage device without departing from the scope of the present invention. Moreover, the data repository **230** may be managed by any database platform (e.g., Oracle, Microsoft Access, IBM DB2, etc.) without departing from the scope of the present invention.

End user interfaces **212** and supplier user interfaces **214** may also allow an implemented feature that enables the setting of user configuration preferences. This feature allows a super user, with enhanced administrative capabilities, to have full access to the features of end user and supplier user interfaces. Some of these features may include: sending an email notification of a specific requisition order, and a corresponding link for accessing the same; full access to the features of the end user and supplier user interfaces; the capability to approve or reject a full order or a specific order item requested by an end user; the capability to take ownership and/or control of a specific requisition order, which may be organized according to a product or supplier category; the capability to expedite or accelerate an order through to specific steps along the ordering process, including the final review step; and, the capability to invoke and view a summary and history of each end user's latest order activity.

Moreover, a super user, for example, may design and/or otherwise configure and customize the style, type, layout, and level of data that is displayed on the respective end user interface **212** and supplier interface **214** for their respective organizations. A super user is also able to invoke a setup feature to choose which end users may have access to specific suppliers. Furthermore, a super user may also determine what information is required from the end users and supplier users of their respective organization, and determine the level of access at which an end user may access a specific supplier within the hosted supplier products catalog. This capability enables a super user to configure, for example, whether an end user can view specific products from specific suppliers, the currencies given for product/item pricing, and place orders. Moreover, the end user interface of the present invention allows for features of the present invention to be configured as permission driven. As such, certain features may be accessible to each end user, based on the end user's precedence within the organization, which likely affects his/her corresponding permission level. In addition, each feature is configurable to each end user based on a set of variable options. These variable options may include the ability to set a specific layout/view, a preferred number of search results, a preferred list of products, or a preferred list of suppliers. Also, each feature may include a help function that allows an end user to resolve inquiries or difficulties relating to the feature. The end user interface implementation is usually account login-based and, as described in further detail above, may encompass multiple server types (e.g., running a Linux OS), a redundant firewall and load balancer, and a priority-based software programming architecture (e.g., implemented in JAVA and JSP).

FIG. 3 illustrates an exemplary user interface in accordance with the present invention. For purposes of example only, an end user interface is used to describe various aspects of the present invention. As shown in FIG. 3, user interface **300** provides customized information for the user. For example, the user is a member of a fictitious group named Weet Organization. The user interface **300** includes one or more of an organizational message area **310**, any system message area **320**, and task items area **330**. In the example

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shown, the user is a super user and therefore, the “Admin” tab **340** is active. Had the user been an end user, the “User” tab would be active and the “Admin” tab **340** either would not be displayed or would be inactive. All of these areas and information displayed therein may be customized through the access module **21**. Any configuration definitions are then stored in the user database **32** and invoked upon access/login.

FIG. 3 illustrates an exemplary embodiment of the configuration tools available to a super user. In general, the eProcurement system **10** of the present invention provides a super user the tools needed to configure every aspect of the eProcurement process of an organization for complete customization, thereby effectuating a single instance multi-tenant architecture. That is, the eProcurement system **10** establishes a centralized system that is customizable for each user and/or organization, thereby providing a robust and yet an efficient eProcurement system. More specifically, configuration tool **350** allows a super user to customize the configuration of the eProcurement system **10** specifically for an organization and its users. While exemplary configuration tools are shown, other tools may be included without departing from the scope of the present invention.

FIG. 4A illustrates an exemplary user management tool **400** to create or modify user access, manage user registration, and define the organizational structure. For example, FIG. 4A illustrates a user access human resources (HR) configuration tool **440**. In particular, HR configuration tool **440** allows the super user to establish and describe the organization. For example, the HR configuration tool **440** may be used to define various departments of the organization (**442**), various positions of the organization (**444**), various roles of the users in the organization (**446**), and relationships between the roles, positions, and departments defined for the organization (**448**). As shown in FIG. 4A, the various departments of the organization that require procurement services may be “Engineering,” “IT,” “Legal,” “Math,” etc. As shown in FIG. 4B, there may be various positions within the organization, such as “Buyer,” “Documentation Editor,” “Professor,” “Researcher,” etc. As shown in FIG. 4C, the HR configuration tool **440** is used to define various roles of the users within the organization, such as “Administrator,” “Approver,” “Catalog Manager,” etc. As shown in FIG. 4D, the HR configuration tool **440** is used to define the relationship between the department, position, and role of the users. For example, a “Professor” in “Engineering” may be designated as an “Approver” and “Requisitioner” for the organization while a “Researcher” of “Engineering” may only be a “Requisitioner.” In this manner, the HR configuration tool **440** provides a simple yet efficient mechanism to define the organization for which the eProcurement system **10** is to be utilized.

Once the organization has been defined through the HR configuration tool **440**, user access tool **410** may be used to create or modify a user’s access to the eProcurement system **10** for the user’s organization. As shown in FIG. 4E, the user access tool **410** may be used to create a new user access account (**410a**) or the user database **32** may be searched (**410b**) for an existing user in the eProcurement system **10**. To create a user access account, the user access tool **410** requires entry of the user’s personal information (e.g., name, phone number(s), email address) and authentication information (e.g., login ID and password). In addition, the user’s department and position information as created through the HR configuration tool **440** is also provided. In an exemplary embodiment, the department and position information created through the HR configuration tool **440** are shown in a drop-down menu for easy selection and entry. To simplify the creation of an account, existing user files may be imported

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into the user database through the user import **430**. Once a user access account has been created, the newly created accounts are activated through the user registration monitor **420**. As shown in FIG. 4F, a list of new user access requests is presented in the user registration monitor **420**. A designated approver for the organization then reviews and approves the user access account to be activated for the user.

In accordance with an exemplary embodiment of the present invention, every aspect of the organization may be defined and customized in the eProcurement system **10**. For example, as shown in FIG. 4A, once a “Department” has been created for an organization, the created department may be activated (**442a**). Moreover, each department may be defined with business rules related to the department’s requisition (**442b**), purchase orders (**442c**), and fulfillment (**442d**). For example, FIG. 4A shows that the “Engineering” department has been designated as an active department with the “Requisition” and “Purchase Order” rules including a list of approvers for the Engineering department. As shown in FIG. 4B, a created position may be designated for a created department. For example, FIG. 4B shows that the organization has the “Professor” position for the “Engineering,” “Math,” “Microbiology,” and “Purchasing” departments. FIG. 4G illustrates an exemplary embodiment of the HR configuration tool **440** for defining roles of the organization.

For each role, the roles configuration tool **446** is used to define the role properties (**446a**), purchasing properties (**446b**), access permissions (**446c**), materials management rules (**446d**), and history of modifications to these definitions (**446e**). For example, for the role of “Administrator,” the role properties **446a** (FIG. 4G) may include whether the designated role is active in the organization and the purchasing properties **446b** may include definitions of any internal and external purchasing codes and information (e.g., “PRWF”) (FIG. 4H), purchasing/approval limits (FIG. 4I), allowed product views (FIG. 4J), and allowed punch-out access (FIG. 4K). The access permissions **446c** may be defined for the roles including shopping cart permissions (FIG. 4L), orders (FIG. 4M), approvals (FIG. 4N), accounts payable (FIG. 4O), administration (FIG. 4P), management of materials (FIG. 4Q), and custom fields permissions (FIG. 4R). The materials management **446d** defines the available projects and location of groups to the various roles (FIG. 4S). The history section **446e** keeps track of a history of all the actions (e.g., modified, created, product view added, product view removed, punch-out access added, punch-out access removed, project added, project removed, location added, location removed, etc.) and the sections to which the actions were applied (e.g., role properties, product views, punch-out access, materials management, permissions, purchasing/approval limits, custom field permission definitions, etc.) including the old value of the parameter and the new value of the parameter (FIG. 4T).

Once the internal organizational structure and descriptions of key positions of users in the organization have been defined using the user management tool **400**, specific users and their level of access may be defined. As discussed above, the level of access of a user may be assigned globally based on their positions and/or roles in the organization. In addition, the eProcurement architecture of the present invention allows customization down to specific individuals all within the single instance, multi-tenant environment. For example, FIG. 5A illustrates an exemplary user profile tool **500** for defining a user’s account in the eProcurement system of the present invention. As shown, the user profile tool **500** includes one or more of a user setting tool **510**, user purchasing tool **520**, user permissions tool **530**, user materials management tool **540**, and user setting history tool **550**. These tools provide cus-

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tomization of the user's account for various levels of access to the eProcurement system of the present invention all within the single instance, multi-tenant environment.

For example, as shown in FIG. 5A, an exemplary user setting tool **510** of the present invention shows that the user is a "Professor" in the "Engineering" department. As discussed above, users in this department and position have default levels of access defined by a super user using the user management tool **400**. However, because a user may have additional roles assigned to the user that are beyond the normal scope of the user's position, the eProcurement system of the present invention allows a super user to modify the user's level of access on an individual level. For example, FIG. 5B illustrates an exemplary roles selection tool **510c** to modify the roles assigned to the selected user. Through the roles selection tool **510c**, a super user may be able to specifically tailor the roles of a user down to the individual level to provide customized access to the eProcurement system of the present invention. Similarly, the user's departmental permissions may be modified using the department permissions tool **510d**. Various aspects of the user's account may also be customized, such as the user's personal settings **510b**, email preferences **510e**, and navigation setup **510f**. As with the user management tool **400** and the roles/permissions tools **510c** and **510d**, all customizations may be performed by simply activating/deactivating a function available on the eProcurement system of the present invention. For example, FIG. 5C illustrates an exemplary email preference tool **510e**, which lists all of the action notifications that may be received via email. A user only has to activate/deactivate a preference by selecting the notifications the user wishes to receive via email. Similarly, FIG. 5D illustrates an exemplary navigation setup tool **510f**. As shown, a user simply selects the navigation tools to be displayed (or removed) from the top-level navigation bar.

The user purchasing tool **520** shown in FIG. 5E allows a super user to define the purchasing activities of the user. For example, as shown in FIG. 5E, user purchasing tool **520** includes one or more of the custom fields tool **520a**, financial approvers tool **520b**, purchasing/approval limits tool **520c**, shipping/billing address tool **520d**, product views tool **520e**, and punch-out access tool **520f**. The custom fields tool **520a** is similar to the purchasing properties tool **446b** (FIG. 4H) to define the internal and external codes needed to make a purchase (e.g., product code). The financial approvers tool **520b** designates purchase approvers for the user. Default, preferred, and additional approvers may be designated through the financial approvers tool **520b** as well as removing approvers for the user. The purchasing/approval limits tool **520c** designates the limits of purchases and/or approvals of purchases allowed for the user. FIG. 5E illustrates an exemplary view of the purchasing/approval limits tool **520c**. As shown, the limit values of various activities related to purchases may be defined for the user. The shipping/billing address tool **520d** designates the shipping/billing address associated with the user. The product views tool **520e** designates the type of products the user is allowed to view. The punch-out access tool **520f** designates the punch-out catalogs that are allowed to be accessed by the user. For example, FIG. 5F illustrates an exemplary punch-out access tool **520f**. As discussed above, these settings may be designated as a default based on the department/position/role assigned to the user. However, these tools may be used to customize the default settings for the specific individual user in accordance with the present invention.

In a similar fashion, the user permissions tool **530** includes one or more of tools to customize the user's access to the shopping cart (FIG. 5G), order processing (FIG. 5H),

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approval processing (FIG. 5I), accounts payable processing (FIG. 5J), administration permissions (FIG. 5K), materials management (FIG. 5L), and custom fields permissions (FIG. 5M). The materials management tool **540** designates inventory locations based on projects and groups (FIG. 5N) as well as default/preferred access locations (FIG. 5O). As discussed above, the history tool **550** keeps track of all actions/changes made to the various parameters.

FIG. 6A illustrates an exemplary organization setup tool **600** for designating business rules such as method of payment (FIG. 6A), tax (FIG. 6B), shipping/handling (FIG. 6C), settlement (FIG. 6D), purchase order terms (FIGS. 6E-G), order distribution process (FIGS. 6I-J), and history of all actions effectuated through the organization setup tool. By organizing all of the terms and conditions of an order for each organization in a single instance, multi-tenant architecture, each requisition effectuated on the eProcurement system of the present invention is processed efficiently.

FIG. 7 illustrates an exemplary workflow setup tool **700** to define the workflow process of a requisition, purchase order, and fulfillment. As shown in FIG. 7, the workflow setup tool **700** in accordance with the present invention creates a shared workflow space **710** and allows for the assignment of users (e.g., individual users, or users of various user roles) to be included in the workflow process.

Other configuration tools include document setup tool (FIG. 82, document setup interface) to organize documents related to requisitions, purchase orders, and sales orders for access by the user. The document setup tool keeps track of the name of the document creator, version number, and any deployment dates, as well as other data related to the document. Moreover, the eProcurement system in accordance with the present invention includes a field management tool (FIG. 80, exemplary field management interface) that allows super users to create, modify, and manage every field/parameter related to the procurement process used on the system. Accordingly, the eProcurement system of the present invention may be custom tailored for each organization/user role/user while maintaining its single instance, multi-tenant environment.

As shown in FIG. 2, end user interfaces **212** and supplier user interfaces **214** according to the present invention provide access to the plurality of modules of the eProcurement system **10** (FIG. 1). As described above, the end user interface **212** is configurable by both end user and super users. Moreover, the end user interface **212** includes one or more features, for example, such as searching and viewing a hosted supplier products catalog, invoking purchase/requisition orders, consummating sales transactions, invoking status queries and viewing the response, and setting end user configuration preferences as described further below. For example, the search and view feature allows for searching via product description, supplier name, manufacturer name, catalog no. (SKU), a filtering capability, and by browsing: catalog/non-catalog items, suppliers, or contracts. A user may invoke any of these search inputs alone or in combination with others. Also, Boolean and fuzzy logic functionality is available for searching and allows a user to devise targeted search strategies that may return more accurate search results. Once a user has invoked a search using any of the inputs described, the user may then view the returned results. The returned results can be filtered by a user based on category or supplier. Also, a user may choose to organize the returned results such that similar results are listed in proximity of one another. For example, a user may organize returned results by weight, supplier, category, catalog number, product description, UOM, product size, price, quantity, and/or currency.

The catalog may be implemented as single instance but multi-tenant (or, as multiple instance, single-tenant), and may further include custom views of items as set by each internal end user and/or organization. An end user may specify favorites within the catalog. Such favorites are available for later viewing or purchasing by the end user. Any updates made to an end user favorite within the catalog will be automatically propagated to the end user's favorite(s) view as well (FIG. 81, an exemplary update favorite(s) process flow). The catalog may allow for supplier classifications and multiple products may be linked to a single supplier. Also, the catalog can be activated or deactivated through a simple click on the end user interface, and specific product categories can be globally manipulated and applied to affect all end users. Each catalog may contain information regarding one or more suppliers, and a master product database is primarily tasked with populating each hosted supplier products catalog. This master product database is a relatively large database with a plurality of attributes related to one or more specific products.

In addition to the hosted supplier products catalog, punch-out catalogs may also be implemented as an alternative and supplement to the hosted supplier products catalog, and are made available, for example, when the hosted supplier products catalog does not yield sufficient or satisfactory results. The punch-out catalogs link to outside/third-party catalogs, are not hosted, and may also contain end user organization-specific prices. Processing modules executed on the custom database servers invoke each punch-out instance. Multiple punch-out catalogs may be accessible by a single end user. An end user can return from a punch-out catalog to the hosted supplier products catalog, and the remainder of the features of the eProcurement architecture, via a submit feature, which will then return to the processing module that initially invoked the punch-out instance. Punch-out catalogs may be configured to display relevant catalogs to an end user, based on the end user organization. An end user can browse punch-out catalogs to search for more accurate results and may, subsequently, invoke a requisition order via the third-party web site and order processing methods. Also, one or more purchase orders can be sent from one or more punch-out catalogs, but each punch-out order session may generate a single purchase order that may ultimately include orders from non-punch-out or hosted catalogs.

Further, with respect to the hosted supplier products catalog, there may be a feature implemented to allow both its searching and viewing. The search/view catalog feature is invoked via a processing module that executes on the custom database servers. Upon the execution of such a search by an end user, search results can be displayed via the end user interface. The catalog search results can be displayed, for example, using a static or dynamic interactive list or table, attachment, graphic, or link. An end user may also have the option of choosing the appropriate supplier(s) from which to place an order. Upon an end user's selection of a particular supplier, the relevant supplier data is then forwarded to the transaction processing feature. The end user may later invoke a status query, via a processing module executed on the custom database servers, on a preexisting order and, subsequently, receive status notifications regarding the order.

The search feature may be implemented using several sub-features such as, for example, customized annotations (with icons) of preferred/contract suppliers, a product/supplier filter, and a product size filter. The search feature is invoked by a processing module that is executed on the custom database servers. The customized annotations (with icons) of preferred/contract suppliers allows certain products to be highlighted within search results. Furthermore, the product/sup-

plier filter of the search feature allows certain products to be displayed, while others are hidden, depending on specific filter criteria chosen by the end user/organization. Such criteria may include, for example, price thresholds, hazard level, approximate delivery date, product size, supplier, and/or currency.

The search architecture is based upon an indexed, tokenized-type implementation. This search architecture may include a search engine and a tokenization feature, both of which are invoked via processing modules executed on the custom database servers. Product elements such as the product name, industry, price, currency, and availability, among others, are primarily used to generate a product search index (e.g., a token). The process of generating a product search index/token is called "tokenization" and may be executed by a tokenization feature invoked via a processing module. The indices/tokens generated as a result of the tokenization feature, which relate to various products of a multitude of suppliers, may be stored within and executed on the hosted supplier products catalog. Searching is executed against "verticals." A vertical is designed similar to a drill-down menu architecture that consists of root nodes and leaf nodes, which are children of their respective roots. Through the use of tokenization and verticals, a layer of abstraction is added that is unique in comparison to typical text-based searching of a large database, like the master product database. This added layer of abstraction allows for better organization of the underlying data. As a consequence, the use of tokens to search verticals, which organize supplier product data and search the hosted supplier products catalog, enables an efficient and methodical search strategy to be executed. Search results returned from searching the hosted supplier products catalog are forwarded back to the search engine and may appear via the end user or supplier user interfaces. For an end user, designated preferred suppliers usually appear first in the search results.

Further contained within the search architecture, a feature to allow the invocation of status queries and viewing of the response may be implemented. This feature allows a plurality of end users to send queries/requests via middleware/web methods, or direct Internet posting techniques, to the product catalog. The feature is itself invoked by a processing module that executes on the custom database servers. Such queries/requests may be intended for finding, buying, or managing products. Such products may be those of preferred contractors that are matched to the end user based on a plurality of criteria like permission, product type, industry, price, quality control metrics, delivery date, warranty types, currency, and/or locale. Each product catalog may contain information regarding one or more specific products. A master product database populates the hosted supplier products catalog with various types of information relating to one or more specific products. The various types of information may include a "stock keeping unit" (SKU) identifier, supplier information, and product category/description/attribute information.

Further also to the search architecture, an in-stock query feature may be implemented to allow an end user, through the middleware/web methods, or direct Internet posting techniques, to determine whether any supplier might have a particular product in-stock, and/or the warehouse/location where that stock is maintained. The feature is itself invoked by a processing module that executes on the custom database servers. Once the in-stock query feature is invoked, relevant suppliers are sent individual queries. Subsequently, each supplier response to an in-stock query is processed and the appropriate

end user is notified after the in-stock query receives the supplier response(s), but before returning to the processing module.

Moreover, a quick order feature may also be implemented to enable several other sub-features such as, for example, searching by product category, SKU identifier, currency, or host product category number/supplier part number. The feature is itself invoked by a processing module that executes on the custom database servers. Subsequently, the order feature is initially invoked by an end user that has completed a quick order search. Thus, the quick order feature enables an end user that may have knowledge of specific product attributes to perform an expedited search, retrieve search results, and proceed to ordering.

The search results of a product search exhibit other features of the invention such as those related to the presentation of results. For example, suppliers and categories contained within search results can be displayed using different customizable icons, which may be used to highlight specific suppliers and product categories. Such results can also be ranked according to priority based on whether they are supplied from preferred or contracted suppliers, a preferred category of products from suppliers, or a preferred currency. Non-preferred or non-contracted supplier or currency results may also be presented to end users. Moreover, a product comparison chart can be invoked to highlight the differences and similarities among two or more products. The chart can contain static or dynamic presentation attributes based in part on supplier-provided data. For example, the in-stock attribute, a dynamic presentation attribute, can be used to identify whether specific products are actually available in a supplier's inventory, and their corresponding prices and/or currencies. A search result list can be organized by category and/or vendor based on end user preferences. Also, icons can be used to further display and highlight relevant information regarding products such as, for example, whether products are hazardous, toxic, poisonous, or are considered to be controlled substances. A proprietary taxonomy can also be implemented against modeling product categories to enable more efficient searching and, ultimately, user-friendly, organized search results.

FIGS. 8A-8D illustrate exemplary search engines in accordance with the present invention. For example, FIG. 8A illustrates an exemplary parametric search engine **810** and punch-out catalogs **820**. FIG. 8B illustrates an exemplary quick order search engine **830**. FIG. 8C illustrates an exemplary browsing engine based on suppliers. FIG. 8D illustrates an exemplary browsing engine based on categories of the products and/or services. Other search engines may be used without departing from the scope of the present invention. Therefore, an eProcurement system in accordance with the present invention couples the configuration tools described above for customizing access to specified suppliers and/or specified types of products based on department, position, roles, and/or permissions of the user for each organization with various search engines in a single instance, multi-tenant architecture.

As shown in FIG. 2, the supplier user interface **214** in accordance with the present invention and further described below is configurable by supplier users and super users, and includes one or more features, for example, such as accessing a supplier hosted products catalog, viewing and responding to purchase orders, consummating sales transactions, viewing and responding to status queries, and setting supplier user configuration preferences. Each individual end user and supplier user may have a different interface from another end user and supplier user, respectively. Furthermore, the supplier end user interface of the present invention may allow a plurality of

supplier users to send queries/requests via middleware/web methods server **224** to custom database servers **222**, and to a hosted supplier products catalog **234** that is multi-tenant managed. A remote supplier user query/request is sent via the supplier end user interface **214** over the Internet, or other networked connection, and is first received by the web servers **225** after passing through the firewall **218**. Then, the web server **225** passes the query/request to the middleware/web methods server **224**, where business rules may be enforced. Subsequently, depending on whether the query/request is related to a transaction or a user search, it is either forwarded to the transaction processing servers **223** or custom database servers **222**, respectively. For either type of query/request, the hosted supplier products catalog **234** is then readily accessible via processing modules for exchanging transaction/product data, or performing a search/supplier operation. The hosted supplier products catalog **234** can serve as a quasi-link between the end user interface and the supplier interface because it is accessible by both interfaces. Supplier users can access the catalog via the middleware/web methods servers **224**, which then forward the supplier access request to the custom database servers **222** and processing modules for execution, in order, for example, to update their own supplier data. End users may be able to search multiple suppliers within the catalog via the end user interface **212**, subject to access rules set by a super user. End users may search the catalog for specific end user product requirements via the middleware/web methods servers **224**, which forward the end user search request to custom database servers **222** and processing modules for execution. Subsequently, the end user may then invoke requisition and purchase orders via the middleware/web methods servers **224**, which forward the end user order to the transaction processing servers **223** for execution.

As described above, to support the product search function, the eProcurement system of the present invention includes a master catalog database of all the products from all the suppliers hosted on the system to implement a single instance, multi-tenant environment. Accordingly, the eProcurement system of the present invention includes a catalog management tool **900**. The catalog management tool **900** includes one or more of supplier tool **910**, categories tool **920**, supplier classification tool **930**, category classification tool **940**, product views tool **950**, pricing tool **960**, map attributes tool **970**, and consortium management tool **980**.

FIG. 9A illustrates an exemplary catalog management tool **900** with an exemplary supplier tool **910** invoked. The supplier tool **910** includes a search engine that searches for existing suppliers hosted in the eProcurement system of the present invention. Furthermore, the supplier tool **910** adds new suppliers not yet hosted in the system. FIG. 9B illustrates an exemplary categories tool **920** that configures all the products offered from the hosted suppliers into defined categories. Classifications for suppliers and product categories within the system of the present invention are defined and managed by the supplier classification tool **930** (FIG. 9C) and category classification tool **940** (FIG. 9D). In particular, new classes of suppliers and product categories may be created, defined, and configured as needed through the supplier classification tool **930** and category classification tool **940**. In addition, existing classifications of suppliers and product categories may be modified. The product views tool **950** manages the views of products based on the defined supplier and product categories (FIG. 9E).

FIG. 9F illustrates an exemplary pricing tool in accordance with the present invention. As shown, pricing tool **960** manages various pricing sets of each hosted supplier for the

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hosted products (or, the tool **960** may also be applied to non-catalog items, forms, or other non-hosted suppliers or products/items). The pricing set types may include organizational prices, contract prices, list prices, and consortium prices. Other pricing sets may be used without departing from the scope of the invention. The pricing tool **960** tracks versions of each type of pricing sets, status of the pricing sets (e.g., implicitly approved, not reviewed, rejected, approved, etc.), as well as the audit history of each pricing set. Accordingly, the appropriate pricing set may be tracked, managed, and invoked for each organization for each type of product.

Other types of catalog management tool **900** include the map attribute tool **970** and consortium tool **980**. The map attribute tool **970** manages various parameters of the procurement activity, such as product codes, parameter format, and unit of measure (UOM). For example, commodity code configuration parameters may be set through the map attribute tool **970** to determine if and how the category taxonomy is to be mapped to, for example, an organization's set of category/commodity values. The commodity codes may be modified as categories, sub-categories, and on down to the product level. The list of values may be set manually or imported/exported from/to an already existing file. As another example, universal product codes (e.g., UN/SPSC) and UOM may also be configured to be mapped to an internal organization codes for automatic conversion when searching, viewing, and ordering products. Further, UOM may be mapped from standard UOM to organization specific UOM. The consortium tool **980** defines various consortiums that an organization may be a member of and offer consortium pricing by designating a supplier as a consortium supplier. Hence, all organizations that are members of the consortium will be offered the consortium pricing set when ordering from the designated supplier.

As shown in FIG. 2, the server technology of the present invention includes a middleware/web methods server **224** that hosts a variety of features related to administrative services management, content management, and application management described above. The middleware/web methods server **224** may, for example, manage business rules (i.e., the relationships) between end users and suppliers based, in part, on contractual terms or other arrangements, as processed according to the price and file management feature. For example, supplier user-side business rules may, for example, designate preferences regarding delivery terms (e.g., restrictions against odd lot sales, FOB preference, carrier preference, etc.), and price and insurance terms (e.g., CIF preference, applicable sales tax, etc.). Similarly, end user-side business rules may, for example, designate preferences regarding preferred suppliers, delivery terms (e.g., FOB preference, default quantity, carrier preference, etc.), and price and insurance terms (e.g., CIF preference, applicable sales tax, etc.). At least one advantage of implementing end user-side and supplier user-side business rules is the capability to generate customized purchase orders in accordance with contractual or default business rules. Such purchase orders are created by the invoke requisition/purchase orders feature, which is invoked via processing modules that are executed on the custom database servers **222**. Middleware/web methods server **224** may apply default ordering, sales, delivery, and other terms in the instance where an end user and supplier user do not have existing contractual terms or other arrangements.

The middleware/web methods server **224**, as well as the transaction processing server **223**, implements the price and file management feature to access existing contracts between end users and suppliers. The feature is usually implemented

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as a component of the middleware/web methods server **224**, but may also be invoked via transaction processing modules that are executed on the transaction processing servers. Contract management algorithms may also be implemented as a sub-feature of the price and file management feature. For example, the algorithms are usually responsible for accessing, retrieving, and processing data from each respective end user and supplier that might have negotiated a contract. FIG. **10** illustrates an exemplary contracts management tool **1000** that may be used to manage the contracts between an organization and a supplier. The contract data is accessible by the transaction processing servers **223** and transaction database **238**. Suppliers are able to submit product prices and other product related data via the price and file management feature. Furthermore, multiple pricing/currency schemes can be created by suppliers for end user organizations and may be based on contractual terms negotiated between end user organizations and suppliers. Individual end users within the same organization, for example, may be assigned different price/currency schemes that may be based on different contractual terms with an individual supplier. A designated end user (e.g., a "contract manager"), akin to a super user, can be assigned the responsibility for managing and choosing the pricing schemes displayed to each individual end user within the organization. The designated end user may also be tasked with ranking the spending thresholds for triggering a new price tier. Individual end users are capable of accessing pricing schemes for supplier products where the end users have been granted access by the designated end user or super user. By default, the lowest supplier pricing scheme available is first displayed to the end user, although other pricing schemes may also be available and accessible.

The following algorithm, for example, may be implemented to determine which pricing scheme should be displayed to an individual end user. First, all pricing schemes for a specific product may be denoted as accessible. A filter-type method may then be used to exclude pricing schemes denoted as inaccessible to the end user organization and, thus, allowing only accessible pricing schemes. Another filter-type method may be used to determine which accessible pricing schemes, if any, are related to contracts negotiated between the end user organization and accessible suppliers. If no pricing schemes are related to any contracts, then a default/general pricing scheme is displayed to the end user. Finally, if at least one pricing scheme is related to any related contracts, then a filter-type method excludes those pricing schemes related to contracts deemed inaccessible to this end user, and permits the accessible pricing schemes to be displayed. The displayed accessible pricing schemes would, however, be subject to the end user spending thresholds, which may be set by a super user. When an end user invokes the generation of a purchase/requisition order, the appropriate pricing scheme is referenced and can be based upon available contractual terms with the appropriate supplier.

An end user organization can manage pricing schemes such that distinct contracts are assigned to specific end users or super users. The feature to manage pricing schemes is invoked via transaction processing modules executed on the transaction processing servers **223**. The specific end users or super users have the ability to approve or reject contracts, and set extended dates. Moreover, supplier users have the ability to create multiple pricing/currency schemes that may be based on contractual terms with end user organizations. Whether an individual end user/organization is a constituent of a trade group, department, or other organization, may influence the pricing/currency scheme determination. Supplier users can also have the ability to load single or multiple



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pricing/currency schemes for end users within the same data sink (e.g., hosted supplier products catalog), which may later be processed by the price and file management feature and assigned to each respective end user. Moreover, end users can designate specific products from supplier pricing/currency schemes as favorites. End user favorites can be dynamically updated with the lowest available supplier pricing scheme.

The transaction processing servers 223 of the present invention may execute transaction processing modules that query, update, and/or create data model instances within the transaction database 238. Moreover, end users can also approve, request to modify, or reject supplier products within hosted catalogs, and can also assign and route specific supplier products to other appropriate end users for review, dependent upon end user specific attributes like title within the organization. For example, certain end users may be able to access hazardous and/or expensive supplier products, while other end users may not be able to do so based on their precedence/role within the end user organization. Similarly, certain end users may also have the ability to make high-volume orders, while others may not. The hosted supplier products catalog 234 may be routinely updated by each supplier user at his/her discretion, or on a monthly, quarterly, or annual basis, and may contain data from suppliers such as, for example, custom product lists and end user organization-specific prices/currencies.

FIG. 11A illustrates an exemplary cart and requisition tool 1100 in accordance with the present invention. As shown in FIG. 11A, the cart and requisition tool 1100 includes an active cart 1140 for tracking the items designated for purchase from the search results described above. In an exemplary embodiment illustrated in FIG. 11A, the active cart 1140 includes requisition workflow tool 1110 that displays a live view of the requisition process for the items in the cart. For example, the requisition workflow tool 1110 displays the status of the requisition from the point at which a product is added 1110a, the cart is edited 1110b, the requisition is reviewed 1110c, and the order is placed 1110f. The requisition workflow tool 1110 further displays a purchase requisition approval step 1110d as well as a purchase order preview step 1110e. Each of the status boxes 1110a-1110f of the requisition workflow tool 1110 may be invoked to activate the tool that manages the corresponding status. For example, invoking the "Add Products" box 1110a (e.g., clicking on the box) activates the search engine to search for additional products to be added to the cart 1140. Invoking the "Edit Cart" box 1110b activates the active cart 1140 for editing the products in the cart. Invoking the "Review" box 1110c activates a summary of the products included in the requisition, including, for example, accounting codes, billing and shipping addresses, and other customizable data elements that may be configured by the user's organization. Invoking the "PR Approvals" box 1110d displays the set of workflow/approval steps an invoked requisition will be processed through prior to order creation. Invoking the "PO Preview" box 1110e activates a list of purchase orders that are generated if the invoked requisition is approved. Invoking the "Place Order" box 1110f submits the invoked requisition to the steps of the workflow/approval process.

Cart information 1120 such as cart name 1120a, description 1120b, priority 1120c, and assigned approver 1120d are also displayed and may be edited. The cart information 1120 further includes supplier and line item details organized alphabetically, for example, according to each supplier's name, and lists each chosen product description, catalog number, size and/or packaging data, unit price, quantity ordered, price, and currency. For each supplier there is also a

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corresponding supplier subtotal that is calculated according to the total of products chosen by the user.

FIG. 11B illustrates further details of the exemplary cart and requisition tool 1100 in accordance with the present invention. As shown, the cart and requisition tool 1100 includes a requisition review tool 1150, purchase request approval tool 1160, and purchase order preview tool 1170. As described above, the various status boxes (e.g., 1110c-1110e) in the requisition workflow tool 1110 activate the corresponding tool 1150-1170. As shown in FIG. 11B, the requisition review tool 1150 displays information about the requisition being built. For example, as shown, the requisition review tool 1150 includes a summary page 1150a that displays all the information regarding the requisition being reviewed, such as the general information, shipping information, billing information, accounting codes, internal/external notes and attachments, as well as supplier/line item details of the products in the cart 1140. All of the information shown in the requisition summary page 1150a may be edited by invoking the corresponding tool, such as the shipping/handling tool 1150b, billing tool 1150c, accounting code tool 1150d, notes and attachment tool 1150e, supplier information tool 1150f, and taxes/S&H pricing tool 1150g.

For instance, the shipping/handling tool 1150b may be used to set the shipping address of the products in the purchase order as well as designate delivery options, such as "expedite," "shipping method," and "requested delivery date." The billing tool 1150c may be used to set the billing address and billing options, such as accounting dates. The accounting tool 1150d may be used to designate the accounting information of the requisition, such as any fund/grant contacts, organization information, account numbers, product codes, activity summaries, and location. The notes and attachments tool 1150e may be used to designate any internal codes associated with the products in the purchase order, such as custody codes and equipment codes used in the organization. The supplier information tool 1150f may be used to assign or modify supplier information for the products in the order, such as contract information with the supplier, purchase order number, quote number, and purchase order clauses. The taxes/S&H tool 1150g may be used to define the tax/S&H information related to purchases from a particular supplier, such as tax percentage and/or S&H cost from total purchase price (e.g., 0% tax, free shipping if over \$200 purchase, etc.).

FIG. 11C illustrates an exemplary purchase request approval tool 1160 that corresponds to the purchase requisition approval step 1110d in accordance with the present invention. The exemplary purchase request approval tool 1160 graphically portrays the status of the requisition being reviewed (e.g., submission of the purchase requisition 1160a, financial approval 1160b, supplier approval/processing 1160c, LPO 1160d, purchase order creation 1160e, and completion 1160f). As with the requisition workflow tool 1110 (FIG. 11B), each workflow/approval step status box may be invoked to activate a tool, corresponding to each workflow/approval step, to view the reason(s) underlying the workflow engine's invocation of that step. Other intervening or superseding steps may also be portrayed without departing from the scope of the present invention.

FIG. 11D illustrates an exemplary purchase order preview tool 1170 that corresponds to the purchase order preview step 1110e in accordance with the present invention. The purchase order preview tool 1170 permits the user to preview the purchase orders that will be generated from the current active cart 1140. The active cart 1140 corresponding to that user is queried and the preview purchase orders are displayed, as



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shown, in alphabetical order according to supplier name. Other methods of ordering or retrieving the purchase orders corresponding to the user may also be used without departing from the scope of the present invention.

With reference to FIG. 2, the feature to invoke purchase/requisition orders may be hosted on the middleware/web methods servers **224** and managed by the eProcurement architecture of the present invention such that it is executed consistently with end user and supplier user business rules as described above. From a high-level point-of-view, this feature is implemented based on whether the order information sought to be processed by an end user is internal to the organization or supplier related. If the information is internal, it is processed accordingly via the end user **212**, the middleware/web methods servers **224**, through to the custom database servers **222**, and then to the hosted supplier products catalog **234**; otherwise, the information is processed similarly except that the appropriate supplier related databases (e.g., the master product database **236**, and the transaction database **238**) may also be invoked.

An auto purchase order feature is available via the middleware/web methods servers **224** and is invoked via transaction processing modules executed on the transaction processing server **223**, and can populate entries of a purchase order in accordance with applicable end user and supplier contractual terms. The auto purchase order feature allows for the generation of distribution, and payment, rule-based purchase orders based on the customizations effectuated by a super user of the organization in the manner described above. For example, the feature can automatically insert legal terms (e.g., the right to cure product defects, what constitutes rejection and/or revocation of an order, what may constitute a material defect, the seller's return policy, the buyer's acceptance policy, etc.), as well as other non-legal terms and conditions (e.g., preferred delivery dates, shipping and handling instructions, appropriate contact/authorized personnel, payment and receipt of payment instructions, etc.), based on a contract that may be in place between an end user organization and a supplier. If no contract is in place, then the auto purchase order feature may prompt the user or automatically insert default terms and conditions, whether legal or non-legal. The feature may create receipts for each end user initiated transaction/purchase order and add multiple transactions/purchase orders to a single receipt. For capable suppliers, automated responses can be accepted for display to the end user. Such automated responses may include, for example, order acknowledgement and advanced shipping notice. Also, a document search sub-feature allows searching any existing transactions/purchase orders. The auto purchase order feature also supports supplier pricing schemes modeled using the U.S. Dollar as well as all other currency types (e.g., Euro, Yen, Pound, Peso, etc.).

FIG. 12 illustrates an exemplary workflow setup tool in accordance with the present invention. As shown, the workflow setup tool **1200** includes requisition workflow tool **1210**, purchase order setup tool **1220**, and fulfillment setup tool **1230**. These tools are used to setup various aspects of the workflow process as described above. For example, as shown in FIG. 12, the purchase order setup tool **1220** may be used to designate the names of approvers to review and approve purchase orders for a particular organization. As shown, the approver list may be customized for different departments (e.g., Math), types of products (e.g., non-catalog item), and even for specific users. Similarly, the requisition setup tool **1210** and fulfillment setup tool **1230** may be used to designate approvers for requests and fulfillment processes, respectively. Other workflow parameters may be further defined without departing from the scope of the present invention.

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FIG. 13 illustrates an exemplary purchase order approval tool in accordance with the present invention. As shown, purchase order search engine **1310** searches through all of the purchase orders generated by the eProcurement system of the present invention for each of the hosted organizations. The results of the search may be filtered based on display criteria such as "Approver" (e.g., user responsible for approving the document), "Approval Queues," "All Pending Requisitions," "Urgent Approvals," "Unassigned Approvals," "Future Approvals," and "Manual Filter" options. The result list of the purchase orders are displayed in the display portion **1320** with such information as P.O. number, status of the P.O., priority level of the P.O., the date/time of the submission for approval, the name of the requester, the designated supplier, the amount, and selectable options. Using the purchase order approval tool, the approvers as well as the requisitioners may monitor the status of the requests and ascertain where the request is in the workflow process. Using the tools described above, the user may drill down to the lowest level of the request to determine what needs to be done to move the request along if it becomes bottlenecked in the process, for example.

At the conclusion of the ordering process, an approval/rejection of orders feature may be implemented also through the middleware/web methods server **224**, as well as the transaction processing server **223**. The approve/reject order feature is invoked via a transaction processing module that is executed on the transaction processing servers **223**. This feature can be managed by the middleware/web methods server **224** such that it is executed consistently with end user and supplier user business rules. For example, one advantage of this feature is its ability to provide notice of an approved or rejected order to an end user or super user.

FIG. 14 illustrates an exemplary history tool in accordance with the present invention. The eProcurement system in accordance with the present invention keeps a history of all requests, purchase orders, receipts, invoices, and actions (e.g., edits to parameters) made in the system that may be searched and reviewed. History tool **1400**, for example, includes a tool to search for purchase order histories, purchase request histories, receipt histories, and invoice histories. The searches may be made by purchase order number, by requisition, by supplier/SKU numbers, by receipts, by invoices, and by contracts. These parameters may be filtered by dates, users, as well as other specifics of the history being sought.

Finally, a supplier configuration feature may be implemented. This feature allows for the capability to have a supplier master that hosts multiple fulfillment centers. Also, this feature allows for an order processing feature with multiple payment/currency methods for each fulfillment center, the execution of shipping and handling rules, and order distribution features. The order distribution features can include such features as facsimile or email confirmation, as well as other delivery methods, organized hierarchically to ensure purchase order delivery.

FIG. 15 is a block diagram of the electronic procurement system **20** communicating over a network **16** with suppliers **214-A** (to **214-N**) and purchasing organizations **212-A** (to **212-N**). The electronic procurement system **20** generally includes a supplier server application **1542** and purchaser server application **1550**, which may interface with the access engine **21**, contract engine **1554**, search/catalog engine **22**, requisition engine **23a**, order/payment engine **23b**, tracking engine **23c**, and business rules engine **24**.

As described, business rules describe and control the relationships between end users and suppliers based, in part, on

contractual terms or other arrangements, as processed according to the price and file management feature. For example, supplier user-side business rules may, for example, designate preferences regarding delivery terms (e.g., restrictions against odd lot sales, FOB preference, carrier preference, etc.), and price and insurance terms (e.g., CIF preference, applicable sales tax, etc.). Similarly, end user-side business rules may, for example, designate preferences regarding preferred suppliers, delivery terms (e.g., FOB preference, default quantity, carrier preference, etc.), and price and insurance terms (e.g., CIF preference, applicable sales tax, etc.). At least one advantage of implementing end user-side and supplier user-side business rules is the capability to be able to generate customized purchase orders, in accordance with contractual or default business rules.

Non-limiting examples of business rules include:

If the extended price of any line item exceeds the limit set in a users profile, route to the users financial approver.

If the total value of the requisition exceeds the limit set in a users profile, route to the users financial approver.

If a requisition sent to a user for financial approval exceeds the users approval authority set in the users profile, route the requisition to the users financial approver.

If the requisition contains suppliers classified by a users organization as "IT Vendors," send the requisition to the CIO.

Requisitions for the Math Department over \$10,000 are routed to the Vice Chancellor of Liberal Arts.

If any item on the PO is radioactive, route the PO to the environmental health and safety (EH&S) Department for review and approval.

If any item on the PO is classified as hazardous, notify the EH&S Department. No approval is required.

If the account code for a line item on the requisition has a budget, and the requisition will exceed the budget, route the requisition to the Budget Manager.

If the user adds a non-catalog item to their requisition, route it to the Purchasing Department to validate the information entered.

If a requisition is marked for expediting, skip all rules and route directly to the Purchasing Department.

All the above examples of business rules are exemplary and not intended as limiting.

The supplier server application 1542 and purchaser server application 1550 may also interface with the transaction engine 23, which may include the requisition module 23a, order/payment engine 23b, and the tracking engine 23c. Moreover, the supplier server application 1542 and purchaser server application 1550 may send and receive data from the data repository 30, which includes the user database 32, the product index database 34, the product database 36, and the transaction database 38. The engines may communicate via function/method calls, file libraries, and database queries. The contract engine 1554 executes the necessary functions for implementing the contract management feature, which manages and links new or existing procurement contracts, formed between buyer organizations and supplier organization, with a group. For example, a new or existing contract is initially stored in the contracts database 3200 (as described in FIG. 32) and may routinely be updated in accordance with amendments (e.g., extensions, additions of agreed upon terms, assignments, or the like) or other contractual events (e.g., the expenditure of quantity/time/spending limits (i.e., tiers), price fluctuations—e.g., rebates or price reductions, item changes or additions, etc.); at such time intervals as determined by the contract engine 1554, the group is updated accordingly. The group includes, for example, buyer users,

supplier users, the business rules engine 24, items, forms, purchase requisitions/orders, sales orders/invoices, and buyer invoices. Furthermore, the contract engine 1554 also supports contract searching (as described in FIG. 10) based on specific user-specified criteria like, for example, contract number, contract keyword, or supplier/catalog name.

The supplier server application 1542 communicates with a supplier 214-A (to (214-N) over network 16 and the purchaser server application 1550 communicates with a buyer 212-A (also referred to herein as a purchasing organization) over network 16. A supplier user would use a client application 1516-A (to (1516-N) to communicate with, generally, the electronic procurement provider 20 and, specifically, the supplier server application 1542. The client application 1516-A (to (1516-N) may be a web-browser 1518-A (to (1518-N) for the supplier user to use, or may be a standalone application. The web-browser 1518-A or standalone application may display features to manage catalog(s) 1512-A (to (1512-N) and manage sales 1514-A (to (1514-N), which may be communicated via the supplier server application 1542 and displayed to the supplier user. A buyer user would use a client application 1532-A (to (1532-N) to communicate with, generally, the electronic procurement provider 20 and, specifically, the purchaser server application 1550. The client application 1532-A (to (1532-N) may contain a web-browser 1538-A (to (1538-N) for the buyer user to use, or may be a standalone application. The web-browser 1538-A or standalone application may display features to manage purchasing 1533-A (to (1533-N), manage payment 1534-A (to (1534-N), manage users 1535-A (to (1535-N), manage privileges 1536-A (to (1536-N), and/or manage business rules 1537-A (to (1537-N), which may be communicated via the purchaser server application 1550 and displayed to a buyer user. For example, a user that sends a request to the system 20 that is outside the scope of that user's privileges would receive an appropriate denial response from the system 20 and, more specifically, for example, from the manage privileges 1536-A feature.

FIG. 16 is a block diagram of the buyer 212 communicating with the purchaser server application 1550, located at the electronic procurement provider 20, over a network 16. The purchaser server engine 1650 may interface with or include the following modules, or a subset thereof:

- a catalog engine 1655 for managing each supplier catalog by implementing features for uploading catalog data, linking to the proper punch-out catalog(s) (1656) via the punch-out module 22a and back to the buyer, managing supplier showcase promotions and overlays (1657), converting supplier catalog data into a common data format (1658), and interfacing with the search engine 22 for searching the master product database or other accessible database of the electronic procurement system 20;
- an organization database 1660 for storing organization specific information like, for example, business rules (1662), user-related data (1663), or permissions (1664);
- a currency engine 1670 for implementing multi-currency features like, for example, normalizing a plurality of currency data (1671) into a default or preferred currency, interfacing with the search engine 22 to return item search results to a buyer user who sent a request to organize/filter the search results (1672) according to a specific currency, or determining the default or preferred currency with which a supplier requests or requires payment; or
- a workflow management engine 1680 for managing the flow of purchase requisitions to the appropriate approver (via the requisition fulfillment engine 1686) (which may be prioritized via the prioritize receipt feature 1687

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based on user hierarchy, privileges, or business rules), sending the approved requisition back to the appropriate buyer user (via the requisition fulfillment engine 1686), interfacing with the search engine 22 to locate an appropriate requisition and/or purchase order (via the search PO/Invoice feature 1692), forwarding a purchase order to the appropriate supplier (via the requisition fulfillment engine 1686), forwarding a sales order and/or invoice from the supplier to the appropriate buyer user (via the order payment engine 1690 and using the PO/Invoice match feature 1691 for linking a purchase order on the buyer user side with an incoming invoice from the supplier), or sending event updates to the contract engine 1554 (via the contract management engine 1688).

Moreover, the workflow management engine 1680 may also interface with a purchasing engine 1681 that receives orders (via an order entry feature 1682), manage the items a buyer user places in a cart or moves/assigns to a new cart (via a cart management feature 1683), present alternative items to a buyer in lieu of items chosen for requisitioning that are not available according to privileges, inventory or a contractual agreement (via an alternative item present feature 1684), or approve an order if approved by the appropriate approver user (via an order approval feature 1685). In addition, the workflow management engine 1680 may also interface with a form management engine 1693 for receiving requisitions and orders via user-created custom forms stored in a forms database 2300. Once received, the requisitions and orders are then routed to approvers and suppliers, respectively, according to workflow business rules. And, the workflow management engine 1680 also interfaces with the catalog management feature 1695 for retrieving item data related to the items present in the requisitions, orders, or invoices being processed by the workflow management engine 1680.

FIG. 17 is a block diagram of the supplier 214 communicating with the supplier server application 1542, located at the electronic procurement provider 20, over a network 16. The supplier server engine 1750 may interface with or include the following modules, or a subset thereof:

- a catalog engine 1755 for managing each supplier catalog by implementing features for uploading catalog data, linking to the proper punch-out catalog(s) (1756) via the punch-out module 22a and back to the buyer, managing supplier showcase promotions and overlays (1757), converting supplier catalog data into a common data format (1758), and interfacing (1759) with the catalog management feature 1695 for updating the master product database or other accessible supplier-related database of the electronic procurement system 20;
- an item database 1790 for storing item specific information like, for example, item description (1791), price and quantity available (1792), restrictions (1793), or priorities (1794);
- a supplier database 1775 for storing supplier specific information like, for example, detailed supplier data (1776), or supplier catalog data (1777); or
- a sales management engine 1760 for managing the flow of sales orders and sales invoices from the appropriate buyer to the appropriate supplier (via the sale fulfillment engine 1770) (which may be prioritized (via the prioritize customer feature 1771) based on buyer/user hierarchy, privileges, or business rules), shipping (1772) and tracking (1773) the ordered item(s) to the appropriate

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buyer, interfacing with the search engine 22 to locate an appropriate purchase order and/or invoice (via the search PO/Invoice feature 1782), forwarding an invoice to the appropriate buyer (via the sale fulfillment engine 1770), receiving payment on an invoice from a buyer to the appropriate supplier (via the receive payment engine 1780 and using the PO/Invoice match feature 1781 for linking a sales order on the supplier user side with an outgoing invoice from the supplier), or sending event updates to the contract engine 1554 (via the contract management engine 1784).

Moreover, the sales management engine 1760 may also interface with a sales engine 1761 that receives sales orders (via a sale entry feature 1762), manage the items (e.g., goods and/or services) a buyer user requested via the sales order (via a goods management feature 1763), present alternative items to a buyer in lieu of items chosen for ordering that are not available according to inventory or business rules like a contractual agreement (via an alternative item present feature 1764), or approve a sales order if the item(s) is available and complies with business rules (via a sale approval feature 1765). In addition, the workflow management engine 1680 may also interface with a form management engine 1783 for receiving sales orders via user-created custom forms stored in a forms database 2300. Once received, the sales orders are then routed to the appropriate supplier user(s), respectively, according to workflow business rules. Then, the process of fulfilling the order is initiated and managed by the sales fulfillment engine 1770.

FIG. 18 is a block diagram of a supplier client 214. The client application 1516 may be a web-browser 1518 for the supplier user to use, or may be a standalone application. The web-browser 1518 or standalone application may display features for:

- managing catalog(s) 1512;
- managing sales 1514;
- interfacing with the catalog database 1820 to, for example, input or view item restrictions 1821, or to make catalog updates 1822;
- managing forms 1825 by, for example, customizing required forms 1826;
- managing sales 1830 by, for example, entering sales data 1833, approving sales 1834, fulfilling sales orders 1835, and addressing disputes that may arise 1836; or
- processing invoices and payments 1840 by, for example, sending invoices 1841, matching purchase orders to invoices 1842, or processing funds 1843.

FIG. 19 is a block diagram of a purchasing organization client 212. The client application 1532 may be a web-browser 1538 for the buyer user to use, or may be a standalone application. The web-browser 1538 or standalone application may display features to manage purchasing 1533, manage payment 1534, manage users 1535, manage privileges 1536, or manage business rules 1537. In addition, the web-browser 1538 or standalone application may also display features for: interfacing with the user database 1920 to, for example, access or define user privileges 1921;

- managing a buyer organization's business rules 1925 to, for example, define preferred suppliers 1926, items 1927, or catalogs 1928;
- managing workflows 1930 like, for example:
  - the flow of purchase requisitions within the buyer organization,
  - access to catalogs 1932 as may be necessary (via a purchase engine 1931) for forwarding a purchase requisition or order appropriately for approval,

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order entry **1933**, order approval **1934**, order fulfillment **1935** (all via a purchase engine **1931**), or forwarding a sales order and/or invoice from the supplier to the appropriate buyer user (via the payment engine **1940** and using the PO/Invoice match feature **1942** for linking a purchase order on the buyer user side with an incoming invoice from the supplier), processing payment on the order's invoice **1941** (via the payment engine **1940**), or forwarding of a user-customized form in accordance with business rules.

FIG. **20** is a block diagram of a server system **2000**. The server system **2000** generally includes one or more processing units (CPU's) **2002**, one or more network or other communications interfaces **2004**, memory **2010**, and one or more communication buses **2008** for interconnecting these components. The communication buses **2008** may include circuitry (sometimes called a chipset) that interconnects and controls communications between system components. The server system **2000** may optionally include a user interface, for instance a display **2006** and an input device **2005**. Memory **2010** may include high speed random access memory and may also include non-volatile memory, such as one or more magnetic disk storage devices. Memory **2010** may include mass storage that is remotely located from the central processing unit(s) **2002**. Memory **2010** includes high-speed random access memory, such as DRAM, SRAM, DDR RAM or other random access solid state memory devices; and may include non-volatile memory, such as one or more magnetic disk storage devices, optical disk storage devices, flash memory devices, or other non-volatile solid state storage devices.

In some embodiments, memory **2010** stores the following programs, modules and data structures, or a subset thereof:

- an operating system **2011** that includes procedures for handling various basic system services and for performing hardware dependent tasks;
- a network communication module **2012** that is used for connecting the server system **2000** to other computers via the one or more communication network interfaces **2004** (wired or wireless) and one or more communication networks, such as the Internet, other wide area networks, local area networks, metropolitan area networks, and so on;
- a catalog module **2020** that provides information and prices about products in hosted supplier product catalogs; databases **2032**;
- a staging database **2034**;
- a currency module **2040**;
- a sales/purchase management module **2046**;
- a contract management module **2060**;
- a database and management module **2070**; and
- auxiliary services modules **2090**.

The catalog module **2020** may include the following modules, or a subset thereof:

- supplier catalog access module **2022** for providing suppliers with access to their respective hosted supplier product catalogs;
- a user local catalog create/access module **2024** for providing users (purchasing organizations) with local catalogs, in one embodiment generated by the respective users, from which the users can order products from suppliers who are not associated with hosted supplier product catalogs. In one embodiment, a supplier in the local catalogs is a local service provider (e.g. catering or a

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limousine service) from which a user wants to order products and services using the electronic procurement system;

- a schema translate module **2026** for translating catalog data provided by suppliers or purchasing data provided by users into a common format associated with the electronic procurement system;
- a schema update module **2028** for updating data in the common format associated with the electronic procurement system in response to changes in the respective catalog data or purchasing data; and
- a supplier showcase module **2030** for promoting certain suppliers to users of a purchasing organization, which in an embodiment may be performed according to business rules.

The databases **2032** may include all databases used by the system. These databases may in one embodiment be stored as logical partitions in a memory. These databases may in another embodiment be stored as tables in a larger database. These databases may in yet another embodiment be stored in separate memory or storage devices.

The staging database **2034** may comprise a catalog development environment (i.e., a staging area) for catalogs associated with suppliers. The data in the staging area may include complete catalogs, incomplete catalogs in development, partially uploaded catalogs, etc. A supplier can choose to make any or all portions of their respective catalog(s) in the staging database 'live' by syndicating the respective portions. A live catalog is one from which a user or purchasing organization may order items. The item database **2036**, which may be a subset of the staging database **2034**, contains descriptions, characteristics, price, pictures and other pertinent information for items listed in the catalogs.

The currency module **2040** may include the following modules, or a subset thereof:

- a normalize rates module **2042** for normalizing currency rates visible by a purchaser of goods and/or services, purchasing from suppliers using different currencies to that of the purchaser, or by a supplier of goods and services selling to purchasers using different currencies to the supplier; and
- a filter by currency module for allowing purchasers to filter suppliers according to currencies they do business in, or allowing suppliers to filter purchasers similarly.

The sales/purchase management module **2046** may include the following modules, or a subset thereof:

- a template management module **2048**, for managing templates used by suppliers or purchasers of the system in placing orders for goods or services;
- a cost/markup management module **2050** for determining characteristics (e.g., average cost) of inventory and managing the inventory based on the characteristics and a markup rate;
- order receipt module **2052** for determining that an order has been received, and preparing to fulfill the order;
- sale fulfillment module **2054** for fulfilling the order, including invoicing and shipping goods to the purchaser; and
- a receive payment module **2056** for receiving payment associated with an order (both for fulfilled and unfulfilled orders).

The contract management module **2060** may include the following modules, or a subset thereof:

- order receipt module for **2062** for determining that an order has been received and matching the order to a contract;

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sale fulfillment module **2064** for associating fulfillment of an order with a contract and verifying that the received order complies with the contract;

receive payment module **2066** for associating payments with a contract and verifying that appropriate discounts and terms of the contract are reflected in the payment; 5  
associate contract with forms module **2068** for associating the contract with forms used by a supplier or purchaser, such that terms of the contract apply to the form.

The database and management module **2070** may include 10  
the following modules, or a subset thereof:

Access, update and manage database module **2072** for accessing, updating and managing databases in the system, including:

user (purchaser) and supplier module **2074**, for managing 15  
user database **32** as described, which is accessed by a buyer user **12** or supplier user **14** through access module **21** as described;

workflow, catalog and forms module **2076**, for managing 20  
workflow database **3000**, catalog database **2400**, and forms database **2300** as described;

master, transaction and contracts module **2078**, for managing master database **236**, transaction database **238** and contracts database **3200** as described;

staging module **2080**, for managing staging database **3100** 25  
as described;

invoice, purchase order, order, and requisition module **2082**, for managing invoice databases **3300** and **3400**, 30  
order database **2900** and **2500**, requisition database **2700** as described.

The auxiliary services module may include additional features or services related to operation, management, security, authentication, maintenance or other aspects of the electronic procurement system.

FIG. **21** is a block diagram of a server system **2100**. The 35  
server system **2100** generally includes one or more processing units (CPU's) **2102**, one or more network or other communications interfaces **2104**, memory **2110**, and one or more communication buses **2108** for interconnecting these components. The communication buses **2108** may include circuitry 40  
(sometimes called a chipset) that interconnects and controls communications between system components. The system **2100** may optionally include a user interface, for instance a display **2106** and an input device **2105**. Memory **2110** may include high speed random access memory and may also 45  
include non-volatile memory, such as one or more magnetic, optical, or solid state disk storage devices. Memory **2110** may include mass storage that is remotely located from the central processing unit(s) **2102**. Memory **2110** includes high-speed 50  
random access memory, such as DRAM, SRAM, DDR RAM or other random access solid state memory devices; and may include non-volatile memory, such as one or more magnetic disk storage devices, optical disk storage devices, flash memory devices, or other non-volatile solid state storage devices.

In some embodiments, memory **2110** stores the following 55  
programs, modules and data structures, or a subset thereof:

an operating system **2111** that includes procedures for handling various basic system services and for performing hardware dependent tasks; 60

a network communication module **2112** that is used for connecting the server **2000** to other computers via the one or more communication network interfaces **2004** (wired or wireless) and one or more communication networks, such as the Internet, other wide area networks, 65  
local area networks, metropolitan area networks, and so on;

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a web browser **2118** or other tool for providing client access and visibility to the electronic procurement system, where in some embodiments some or all of the operations of the electronic procurement system are performed at a server, and in some embodiments some of the operations of the electronic procurement system are performed at the client;

a catalog module **2120** that provides information and prices about products in hosted supplier product catalogs; 5

databases **2132**;

a workflow module **2142**;

a currency module **2154**;

a contract management module **2160**;

a database management module **2170**; and 10  
auxiliary services modules **2184**.

The catalog module **2120** may include the following modules, or a subset thereof:

a user local catalog create/access module **2122**, in some 15  
embodiments similar to module **2024**, for providing users (purchasing organizations) with local catalogs, in one embodiment generated by the respective users, from which the users can order products from suppliers who are not associated with hosted supplier product catalogs. In one embodiment, a supplier in the local catalogs is a local service provider (e.g. catering) from which a user wants to order products and services using the electronic procurement system;

a supplier showcase module **2124**, in some embodiments 20  
similar to module **2030**, for promoting certain suppliers to users of a purchasing organization, which in an embodiment may be performed according to business rules;

a Punch Out module **2126** for providing access to a catalog or website separate from the hosted supplier product catalogs, and allowing a purchaser to purchase an item from that catalog or website, and process the purchase through the electronic purchasing system;

a present alternatives module **2128**, for presenting alternative items to a prospective purchaser upon determining that an item requested by the purchaser cannot be fulfilled or that a better item might be available; and

a purchaser priority module **2130** for prioritizing purchasers or purchaser orders associated with a user or purchasing organization. 25

The databases **2132** may include all databases used by the system, both on the server side and client side. These databases may in one embodiment be stored as logical partitions in a memory. These databases may in another embodiment be stored as tables in a larger database. These databases may in yet another embodiment be stored in separate memory or storage devices. The databases may include the following 30  
databases or modules, or a subset thereof:

business rules database **2134** for storing business rules associated with a user, purchasing organization or supplier, wherein in some embodiments the business rules may be set by a super-user or administrator associated with an organization;

user privilege database **2136** for storing privileges associated with users, such as purchasing privileges, approval privileges, etc.;

organization priority database **2138** for storing priority information associated with users or purchasing organizations in the electronic procurement system; and

user created forms/search database **2140** for storing forms, search queries, etc associated with a user or purchasing organization, or associated with a supplier. 35

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The workflow module **2142** may include the following modules, or a subset thereof:

cart management module **2144** for allowing a user or organization to manage a shopping cart associated with the purchase of items;

assign/move/schedule cart module **2146** for allowing a user or organization to assign a cart to another user, to move items from one cart to another (including a new) cart, and to schedule a cart for purchasing;

purchasing/checkout module **2148** for allowing a user to checkout one or more carts and purchase the items in the one or more carts;

order fulfillment module **2150** for verifying that an order has been received and processed for fulfillment, wherein in some embodiments this may be similar to sale fulfillment module **2054** for fulfilling the order; and

payment module/currencies **2152** for processing payment for an order, including converting currencies if necessary.

The currency module **2154** may include the following modules, or a subset thereof:

a normalize rates module **2156** (in some embodiments similar to module **2042**) for normalizing currency rates visible by a purchaser of goods and/or services, purchasing from suppliers using different currencies to that of the purchaser, or by a supplier of goods and services selling to purchasers using different currencies to the supplier; and

a filter by currency module **2158** (in some embodiments similar to module **2044**) for allowing a purchasers to filter suppliers according to currencies they do business in, or allowing suppliers to filter purchasers similarly.

The contract management module **2160** may include the following modules, or a subset thereof:

an order receipt module **2162** (in some embodiments similar to module **2062**) for determining that an order has been received and matching the order to a contract;

a sale fulfillment module **2164** (in some embodiments similar to module **2064**) for associating fulfillment of an order with a contract and verifying that the received order complies with the contract;

a receive payment module **2166** (in some embodiments similar to module **2066**) for associating payments with a contract and verifying that appropriate discounts and terms of the contract are reflected in the payment; and

an associate contract with forms module **2168** (in some embodiments similar to module **2068**) for associating the contract with forms used by a supplier or purchaser, such that terms of the contract apply to the form.

The database management module **2170** may include the following modules, or a subset thereof:

Access, update and manage database module **2172** (in some embodiments similar to module **2072**) for accessing, updating and managing databases in the system, including:

user (purchaser) and supplier module **2174** for managing user database **32** as described, which is accessed by a buyer user **12** or supplier user **14** through access module **21** as described;

workflow, catalog and forms module **2176** for managing workflow database **3000**, catalog database **2400**, and forms database **2300** as described;

master, transaction and contracts module **2178** for managing master database **236**, transaction database **238** and contracts database **3200** as described;

staging module **2080** for managing staging database **3100** as described; and

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an invoice, purchase order, order, requisition module **2182** for managing invoice databases **3300** and **3400**, order database **2900** and **2500**, requisition database **2700** as described.

The auxiliary services modules **2184** (in some embodiments similar to module **2090**) may include additional features or services related to operation, management, security, authentication, maintenance or other aspects of the electronic procurement system.

FIG. **22** shows a top level data structure **2200** at an electronic procurement provider server. The data structure includes data repository **230**, end user database **232**, hosted supplier product index **234**, master product database **236**, and transaction database **238**. The end user database **232** may in an embodiment include user/security database **3500**. The hosted product index **234** may in an embodiment include summary search database **2460**. The data structure further includes staging database **3100**, and scheduler database **3600**.

The master database is associated with (and may in some embodiments include one or more of) a forms database **2300** and a catalog database **2400**, which in an embodiment includes items database **2401** and prices database **2430**.

The transaction database is associated with (and may in some embodiments include one or more of) buyer invoice database **3300**, sales invoice database **3400**, requisition database **2700**, receipt database **2800**, sales order database **2900**, workflow database **3000**, contracts database **3200**, and purchase order database **2500**. The purchase order database **2500** may in an embodiment include the fax database **2600**, revisions database **2602**, and distribution database **2604**.

FIG. **23** shows a database diagram **2300** including the master database **236**, with master database index **237** indexing into the master database. Master database index **237** includes summary search database **2460**.

In an embodiment, forms database **2300** includes one or more of:

Form Config Section Title Help **2301**, in some embodiments help information for configuring a form section title;

Form Config Group Title Help **2302**, in some embodiments help information for configuring a form group title;

Form Config Element Title Help **2303**, in some embodiments help information for configuring a form element;

Form List **2304**, in some embodiments a list of forms;

Form Config Section **2305**, in some embodiments configuration of a form section;

Form Config Group **2306**, in some embodiments configuration of a form group;

Form List Value **2307**;

Form Config Element **2308**, in some embodiments configuration of a form element;

Form Config Version **2309**, in some embodiments configuration of a form version;

Form User Defined Fields **2310**, in some embodiments user defined fields in a form;

Form User Defined Field Config Parameters **2311**, in some embodiments parameters for configuring user defined fields in a form;

Form List Value Title Help **2312**;

Form **2313**;

Form Audit Trail **2314**, in some embodiments a list of changes to a form for auditing purposes;

Forms User Defined Field Data **2315**;

Forms Up Dist Method **2316**, in some embodiments forms update distribution method details; and

Forms Up Dist Method Data **2317**, in some embodiments forms update distribution method data.

FIG. 24 shows a database diagram **2400** including the master database **236**, with master database index **237** indexing into the master database. Master database index **237** includes summary search database **2460**.

As described, the search architecture is based upon an indexed, tokenized-type implementation. This search architecture may include a search engine and a tokenization feature, both of which are invoked via processing modules executed on the custom database servers. Product elements such as the product name, industry, price, and availability, among others, are primarily used to generate a product search index (e.g., a token). The process of generating a product search index/token is called “tokenization” and may be executed by a tokenization feature invoked via a processing module. The indices/tokens generated as a result of the tokenization feature, which relate to various products of a multitude of suppliers, may be stored within and executed on the hosted supplier products catalog. Searching is actually executed against what are termed as “verticals.” A vertical is designed similar to a drill-down menu architecture that consists of root nodes and leaf nodes, which are children of their respective roots.

The forms database **2300**, and catalog database **2400** are associated with the master database. The catalog database includes items database **2401** and price database **2430**.

In an embodiment, items database **2401** includes one or more of the following:

- Item Attribute Attr Value **2402**, in some embodiments a value for an item attribute;
  - Item Attribute Valid Values **2404**, in some embodiments valid values value for an item attribute;
  - Item Attribute Audit Trail **2406**, in some embodiments a list of changes to an item attribute for auditing purposes;
  - Item Attribute Definition **2408**;
  - Item Attribute Data **2410**;
  - Item **2412**;
  - Chem Structure **2414**, in some embodiments a description of a chemical structure that may be ordered through the procurement system;
  - Chem Structure Supplier **2416**, in some embodiments a supplier of a chemical structure;
  - Item Chemical **2418**, in some embodiments a commercial item of a chemical structure, e.g., a container of a certain chemical structure.
  - Supplier **2420**;
  - Item Image Description **2422**, in some embodiments a description of an image or picture associated with an item;
  - Item Image File Data **2424**, in some embodiments an image data file (e.g., a JPEG image or GIF image, as commonly used in web applications);
  - Item Inventory Config **2426**, in some embodiments data for configuring inventory of an item; and
  - Item Inventory Config Audit Trail **2428**, in some embodiments a list of changes to data for configuring inventory of an item.
- In an embodiment price database **2430** includes one or more of the following:
- Item **2432**, in some embodiments an item for which a price is stored in the price database;
  - Supplier **2434**, in some embodiments a supplier associated with the item;
  - Item Attribute Audit Trail **2436**, in some embodiments a list of changes to an attribute associated with an item, for which a price is stored in the price database;
  - Price Set Org Details **2438**, in some embodiments details of an organization price;

Price Set **2440**, in some embodiments a price for the item; Price Version Approval **2442**, in some embodiments approval for a version of a price associated with the item; Price Version **2444**, in some embodiments a version of a price associated with the item;

Price Set Version **2446**;

Price **2448**, in some embodiments a price for the item;

Submission Price Component **2450**;

Price Version Loading Submission **2452**;

Submission Audit Trail **2454**, in some embodiments for auditing submissions; and

Submission **2456**.

In an embodiment summary search database **2460** includes one or more of the following:

Supplier Price Date **2402**, in some embodiments a date associated with a supplier price;

Supplier Content Date **2404**, in some embodiments a date associated with supplier content (e.g., description);

Organization **2406**;

Supplier **2408**, in some embodiments a supplier of an item;

Searchable Verticals By Rule **2470**, in some embodiments supporting rule-based searching;

Product Rule **2472**, in some embodiments a rule related to a product;

Product Vertical **2474**, in some embodiments supporting product-based searching;

Org Supplier Item Counts **2476**, in some embodiments a count of items stored at an organization supplier;

Product Category **2478**, in some embodiments a category related to a product;

Supplier Category Summary **2480**, in some embodiments a summary of a supplier category;

Item Incr Indexing Queue **2482**, in some embodiments a queue for incrementally indexing items;

Org Favorites Full Indexing Queue **2484**, in some embodiments a full-indexing queue for organizational favorites; and

Org Favorites Incr Indexing Queue **2486**, in some embodiments an incremental-indexing queue for organizational favorites.

FIG. 25 shows a database diagram **2500** including the transaction database **228**, with transaction database index **229** indexing into the transaction database **228**. Transaction database **228** is associated with (and in some embodiments includes one or more of) the following databases:

Purchase Order (PO) DB **2500**, in some embodiments a database of purchase orders;

Fax DB **2600**, in some embodiments a database of faxes;

Distribution DB **2602**, in some embodiments for storing order distributions, where the order distribution features can include such features as facsimile or email confirmation, as well as other delivery methods, organized hierarchically to ensure purchase order delivery, as described;

Revisions DB **2604**, in some embodiments for storing revisions to sales or purchase documents;

Buyer Invoice DB **3300**, in some embodiments for storing buyer invoices;

Seller Invoice DB **3400**, in some embodiments for storing seller invoices;

Requisition DB **2700**, in some embodiments for storing purchase requisitions;

Receipt DB **2800**, in some embodiments for storing receipts;

Sales Order DB **2900**, in some embodiments for storing sales orders;

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Workflow DB **3000**, in some embodiments for storing workflow data relating to sales, purchases and transactions, etc.; and

Contracts DB **3200**, in some embodiments for storing contracts.

In an embodiment, Purchase Order (PO) DB **2500** includes one or more of:

Config Section Title Help **2502**, in some embodiments help information for configuring a section title;

PO Config Group Title Help **2504**, in some embodiments help information for configuring a purchase order group title;

PO Config Element Validation **2506**, in some embodiments validation information for configuring a purchase order element;

PO Audit Trail **2508**, in some embodiments a purchase order audit trail;

PO WF Activity History **2510**, in some embodiments a purchase order workflow activity history;

PO Config Group **2512**, in some embodiments configuration of a purchase order group;

PO Config Section **2514**, in some embodiments configuration of a purchase order section;

PO Config Element **2516**, in some embodiments configuration of a purchase order element;

PO Config Version **2518**, in some embodiments configuration of a purchase order version;

PO Config **2520**, in some embodiments configuration of a purchase order;

PO Summary **2522**, in some embodiments a purchase order summary;

PO Dist Method Data **2524**, in some embodiments data for a purchase order distribution method;

PO Dist Method **2526**, in some embodiments a purchase order distribution method;

PO **2528**, in some embodiments a purchase order;

PO Currency Exchange Rates **2530**;

Supplier **2532**;

Fulfillment Center **2534**;

PO User Selected Approver **2536**, in some embodiments a user-selected approver for a purchase order;

PO Pending Actions **2538**, in some embodiments pending actions relating to a purchase order;

PO PO Clauses **2540**, in some embodiments clauses relating to a purchase order;

PO Line Search **2542**, in some embodiments line search details relating to a purchase order;

PO Line **2544**, in some embodiments a line of a purchase order;

Req Line Address **2546**, in some embodiments an address line relating to a purchase requisition;

PO Line Product **2548**, in some embodiments a product line relating to a purchase order;

PO Credit Card **2550**, in some embodiments a credit card associated with a purchase order;

PO Line Report **2552**, in some embodiments a report line relating to a purchase order;

PO CF Value Set Values **2556**, in some embodiments to set the value of a custom field value in a purchase order;

PO CF Value Set Ctxt **2558**, in some embodiments to set the context of a custom field value in a purchase order;

PO CF Value Set Def **2560**, in some embodiments to set the definition of a custom field value in a purchase order; and

PO User Selected Approver **2562**, in some embodiments a user-selected approver of the purchase order.

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FIG. **26** shows a database diagram **2600** including the transaction database **228**, with transaction database index **229** indexing into the transaction database. The fax database **2600**, distribution database **2602** and revisions database **2604** are associated with the transactions database **228**.

In an embodiment, the fax database **2600**, distribution database **2602** and revisions database **2604** include one or more of:

PO Fax Config Section **2610**, in some embodiments configuration of a purchase order fax section;

PO Fax Config Group **2612**, in some embodiments configuration of a purchase order fax group;

PO Fax Config Element **2614**, in some embodiments configuration of a purchase order fax element;

PO Fax Config **2616**, in some embodiments configuration of a purchase order fax;

PO Fax Config Version **2618**, in some embodiments configuration version of a purchase order fax;

PO Revision Document Relationship **2620**, in some embodiments a document relationship of a purchase order revision

PO Revision **2622**, in some embodiments a purchase order revision;

PO Dist Request **2624**, in some embodiments a purchase order distribution request;

PO Dist Entry Data **2626**, in some embodiments purchase order entry data;

PO Revision Document **2628**, in some embodiments a purchase order document revision;

PO Dist Entry **2630**, in some embodiments entry of a purchase order distribution;

PO Dist Failure **2632**, in some embodiments failure of a purchase order distribution;

PO Dist Service Lock **2634**, in some embodiments locking of a purchase order distribution service; and

PO Dist Service Instance **2636**, in some embodiments an instance of a purchase order distribution service.

FIG. **27** shows a database diagram **2700** including the transaction database **228**, and requisition database **2700** associated with the transaction database.

In an embodiment, requisition database **2700** includes one or more of:

Req Config Section Title Help **2702**, in some embodiments help information for configuring a purchase requisition section title;

Req Config Group Title Help **2704**, in some embodiments help information for configuring a purchase requisition group title;

Req Config Element Validation **2706**, in some embodiments help information for configuring a purchase requisition element validation;

Req Config Section **2708**, in some embodiments configuration of a purchase requisition section;

Req Config Group **2710**, in some embodiments configuration of a purchase requisition group;

Req Config Element **2712**, in some embodiments configuration of a purchase requisition section element;

Req Config **2714**, in some embodiments configuration of a purchase requisition;

Req Config Version **2716**, in some embodiments configuration of a purchase requisition version;

Req File Data **2718**, in some embodiments purchase requisition file data;

Req Currency Exchange Rates **2720**, in some embodiments purchase requisition currency exchange rates;

Req Sup Dist Method Data **2722**, in some embodiments data for a purchase requisition distribution method;



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Req Sup Dist Method **2724**, in some embodiments a purchase requisition distribution method;  
 Req WF Activity History **2726**, in some embodiments purchase requisition workflow activity history;  
 Req Audit Trail **2728**, in some embodiments changes to a purchase requisition for auditing purposes;  
 Req Summary **2730**, in some embodiments a summary of a purchase requisition;  
 Requisition **2732**;  
 Req WF Activity Buffer **2734**, in some embodiments a purchase requisition workflow activity buffer;  
 Req User Selected Approver **2736**, in some embodiments a purchase requisition user-selected approver;  
 Supplier **2738**;  
 Fulfillment Center **2740**, in some embodiments a fulfillment center for a purchase requisition;  
 Req Supplier Group **2742**, in some embodiments a supplier group for a purchase requisition;  
 Req Punchout Session **2744**, in some embodiments a punchout session for a purchase requisition;  
 Req CF Value Set Def **2746**, in some embodiments for setting a definition of a purchase requisition custom field value;  
 Req CF Value Set Ctxt **2748**, in some embodiments for setting a context of a purchase requisition custom field value;  
 Req CF Value Set Values **2750**, in some embodiments for setting a value of a purchase requisition custom field value;  
 Contract **2752**;  
 Req Line Address **2756**, in some embodiments an address line for a purchase requisition;  
 Req Line Address Field **2758**, in some embodiments an address field line for a purchase requisition;  
 Req Line **2760**, in some embodiments a line for a purchase requisition;  
 Req Line Product **2762**, in some embodiments a product line for a purchase requisition;  
 Req Credit Card **2764**, in some embodiments a credit card for a purchase requisition;  
 Req Line Report **2766**, in some embodiments a report line for a purchase requisition;  
 Req Line Search **2768**; in some embodiments a search line for a purchase requisition; and  
 Req File Description **2770**, in some embodiments a file description for a purchase requisition.

FIG. **28** shows a database diagram **2800** including the transaction database **228**, and receipt database **2800** associated with the transaction database.

In an embodiment, receipt database **2800** includes one or more of:

Supplier **2802**, in some embodiments a supplier for a receipt;  
 Receipt **2804**;  
 Receipt Currency Exch Rates **2806**, in some embodiments currency exchange rates associated with a receipt;  
 Receipt PO Relationship **2808**, in some embodiments a relationship between a purchase order and a receipt;  
 Receipt Summary **2810**, in some embodiments a summary of a receipt;  
 Req Line Address **2812**, in some embodiments an address line for a purchase requisition;  
 Receipt Line **2814**;  
 General Product **2816**; and  
 Receipt Line Inventory Replenishment **2818**, in some embodiments an inventory replenishment line for a receipt.

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FIG. **29** shows a database diagram **2900** including the transaction database **228**, and sales order database **2900** associated with the transaction database.

In some embodiments, the transaction database **228** and sales order database **2900** are accessed by transaction processing servers **223** and middleware/web methods servers **224**.

In an embodiment, sales order database **2900** includes one or more of:

Order Config Section Title Help **2901**, in some embodiments help information for configuring a sales order section title;  
 Order Config Group Title Help **2902**, in some embodiments help information for configuring a sales order group title;  
 Order Config Element Validation **2903**, in some embodiments validation for configuring a sales order element;  
 Order File Description **2904**;  
 Order File Data **2905**;  
 Order Config Group **2906**, in some embodiments configuration of a sales order group;  
 Order Config Section **2907**, in some embodiments configuration of a sales order section;  
 Order Config Element **2908**, in some embodiments configuration of a sales order element;  
 Order Config Version **2909**, in some embodiments configuration of a sales order version;  
 Order Config **2910**;  
 Order Summary **2911**;  
 Order PO Clause **2912**, in some embodiments a purchase order clause;  
 Order Audit Trail **2913**, in some embodiments changes for auditing a sales order;  
 Order **2914**;  
 Order WF Activity History **2915**, in some workflow activity history for a sales order;  
 Order CF Value Set Values **2916**, in some embodiments values for a sales order custom field;  
 Order CF Value Set Ctxt **2917**, in some embodiments context for a sales order custom field;  
 Order CF Value Set Def **2918**, in some embodiments definition for a sales order custom field;  
 Order Ext CF Values **2919**;  
 Order Line Search **2920**, in some embodiments a search line for a sales order;  
 Order Line **2921**;  
 Order Shipment **2922**, in some embodiments a shipment for a sales order;  
 Order Line Product **2923**, in some embodiments a product for a sales order;  
 Order Credit Card **2924**, in some embodiments a credit card for a sales order; and  
 Order Shipment Line **2925**, in some embodiments a shipment line for a sales order.

FIG. **30** shows a database diagram **3000** including the transaction database **228**, and workflow database **3000** associated with the transaction database. In some embodiments, the transaction database **228** and workflow database **3000** are accessed by transaction processing servers **223** and middleware/web methods servers **224**.

As described, supplier users can access the catalog via the middleware/web methods servers **224**, which then forward the supplier access request to the custom database servers **222** and processing modules for execution, in order, for example, to update their own supplier data. End users may be able to search multiple suppliers within the catalog via the end user interface **212**, subject to access rules set by the super user. End

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users may search the catalog for specific end user product requirements via the middleware/web methods servers **224**, which forward the end user search request to custom database servers **222** and processing modules for execution. Subsequently, the end user may then invoke requisition and purchase orders via the middleware/web methods servers **224**, which forward the end user order to the transaction processing servers **223** for execution.

In an embodiment, workflow database **3000** includes one or more of:

- Workflow Step **3002**;
- Workflow Step Attr Value **3004**, in some embodiments an attribute value for a workflow step;
- Workflow Process Definition **3006**;
- Workflow Activity Attr Value **3008**, in some embodiments an attribute value for a workflow activity;
- Workflow Activity Relationship **3010**, in some embodiments an relationship for a workflow activity;
- Workflow Activity **3012**;
- Workflow Folder Selection Rule **3014**, in some embodiments a selection rule for a workflow folder;
- Workflow Activity Instance **3016**, in some embodiments an instance of workflow activity;
- Workflow Folder Membership **3018**, in some embodiments membership of a workflow folder;
- Workflow Folder **3020**;
- Workflow Folder Activity Instance **3022**, in some embodiments an activity instance for a workflow folder;
- Users **3024**;
- Workflow Folder Robot Relationship **3026**;
- Workflow Folder Entry **3028**;
- Workflow Robot **3030**;
- Workflow Robot Attr Value **3032**;
- Workflow Dynamic Rule Group **3034**, in some embodiments an dynamic rule group associated with the workflow;
- Workflow Dynamic Rule Group Audit Trail **3036**, in some embodiments an audit trail for a dynamic rule group associated with the workflow;
- Workflow Dynamic Rule **3038**;
- Workflow Dynamic Rule Element **3040**, in some embodiments an element of a dynamic rule associated with the workflow; and
- Workflow Dynamic Rule Audit Trail **3042**, in some embodiments an audit trail for a dynamic rule associated with the workflow.

FIG. **31** shows a database diagram **3100** including the staging database **3100**, and staging catalog database **3101**, associated with the staging database **3100**.

In an embodiment, the staging catalog database **3101** includes one or more of a staging items database **3102**, a staging price database **3131**, and a summary search database **3130**.

In an embodiment, staging items database **3102** includes one or more of:

- Item Attribute Attr Value **3103**, in some embodiments a value for an item attribute;
- Item Attribute Valid Values **3104**, in some embodiments a set of valid values for an item attribute;
- Item Attribute Audit Trail **3105**, in some embodiments an audit trail for an item attribute;
- Item Attribute Definition **3106**, in some embodiments a definition for an item attribute;
- Item Attribute Data **3107**, in some embodiments data for an item attribute;
- Item **3108**;

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Chem Structure **3109**, in some embodiments a description of a chemical structure that may be ordered through the procurement system;

Chem Structure Supplier **3110**, in some embodiments a supplier of a chemical structure;

Item Chemical **3111** in some embodiments a commercial item of a chemical structure e.g., a container of a certain chemical structure;

Supplier **3112**;

Item Image Description **3113**, in some embodiments a description of an image or picture associated with an item;

Item Image File Data **3114**, in some embodiments an image data file (e.g., a JPEG image or GIF image, as commonly used in web applications);

Item Inventory Config **3115**, in some embodiments data for configuring inventory of an item; and

Item Inventory Config Audit Trail **3116**, in some embodiments a list of changes to data or an audit trail for configuring inventory of an item.

In an embodiment, staging price database **3131** includes one or more of:

- Items **3132**;
- Supplier **3133**;
- Item Attribute Audit Trail **3134**, in some embodiments a list of changes to data or an audit trail for an item attribute;
- Price Set Org Details **3135**, in some embodiments details of a price setting organization;
- Price Set **3136**, in some embodiments a set price;
- Price Version Approval **3137**, in some embodiments approval for a price version;
- Price Version **3138**;
- Price Set Version **3139**;
- Price **3140**;
- Submission Price Component **3141**;
- Price Version Loading Submission **3142**;
- Submission Audit Trail **3143**, in some embodiments a list of changes to data or an audit trail for a submission; and
- Submission **3144**.

In an embodiment, summary search database **3130** includes one or more of:

- Supplier Price Date **3117**, in some embodiments a data associated with a supplier price;
- Supplier Content Date **3118**;
- Organization **3119**;
- Supplier **3120**;
- Searchable Verticals by Rule **3121**, in some embodiments supporting rule-based searching;
- Product Rule **3122**, in some embodiments a rule related to a product;
- Product Vertical **3123**, in some embodiments supporting product-based searching;
- Org Supplier Item Counts **3124**, in some embodiments a count of items stored at an organization supplier;
- Product Category **3125**, in some embodiments a category related to a product;
- Supplier Category Summary **3126**, in some embodiments a summary of a supplier category;
- Item Incr Indexing Queue **3127**, in some embodiments a queue for incrementally indexing items;
- Org Favorites Full Indexing Queue **3128**, in some embodiments a full-indexing queue for organizational favorites; and
- Org Favorites Incr Indexing Queue **3129**, in some embodiments an incremental-indexing queue for organizational favorites.

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FIG. 32 shows a database diagram 3200 including the transaction database 228, PO database 2500, buyer invoice database 3300, seller invoice database 3400, requisition database 2700, receipt database 2800, sales order database 2900, workflow database 3000, and contracts database 3200, associated with the transaction database 228.

In an embodiment, the contracts database 3200 includes one or more of:

- Supplier 3201;
- Form Configuration 3202;
- Contract Type 3203;
- Contract Form Relationship 3204, in some embodiments an relationship between a contract and a form;
- Contract Scheduler Relationship 3205, in some embodiments an relationship between a contract and a scheduler;
- Contract Owner Relationship 3206, in some embodiments an relationship between a contract and an owner;
- Contract Department Relationship 3207, in some embodiments an relationship between a contract and a department;
- Contract Fulfillment Center Relationship 3208, in some embodiments an relationship between a contract and a fulfillment center;
- Contract Audit Trail 3209, in some embodiments a list of changes to data or an audit trail for a contract;
- Contract Tier Info 3210, in some embodiments tier information for a contract;
- Contract Budget Actual 3211, in some embodiments an actual budget for a contract;
- User 3212; and
- Department 3213.

FIG. 33 shows a database diagram 3300 including the transaction database 228, PO database 2500, buyer invoice database 3300, seller invoice database 3400, requisition database 2700, receipt database 2800, sales order database 2900, workflow database 3000, and contracts database 3200, associated with the transaction database 228.

In an embodiment, the buyer invoice database 3300 includes one or more of:

- Invoice Configuration Section Title Help 3301, in some embodiments help information for configuring an invoice section title;
- Invoice Configuration Section 3302, in some embodiments configuration of a invoice section;
- Invoice Configuration 3303;
- Invoice Configuration Group Title Help 3304, in some embodiments help information for configuring an invoice group title;
- Invoice Configuration Group 3305, in some embodiments configuration of an invoice group;
- Invoice Configuration Element Validation 3306;
- Invoice Configuration Element 3307, in some embodiments configuration of an invoice element;
- Invoice Configuration 3308;
- Invoice Configuration Version 3309;
- Active Invoice Configuration Version 3310;
- User Selected Approver 3311;
- Currency Exchange Rates 3312;
- Invoice Audit Trail 3313, in some embodiments a list of changes (audit trail) to an item attribute for auditing purposes;
- Invoice Summary 3314;
- Invoice 3315;
- Workflow Activity History 3316;
- Supplier 3317;
- Invoice Line 3318;

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Remit to Address 3319;

Pending Actions 3320, in some embodiments pending actions relating to an invoice;

Contract 3321;

PO 3322, in some embodiments a purchase order;

PO Line 3323, in some embodiments a purchase order line;

Invoice Line Product 3324, some embodiments a product line relating to an invoice;

Invoice CF Value Set Def 3325, in some embodiments to set the definition of a custom field value in an invoice;

Invoice CF Value Set Ctxt 3326, in some embodiments to set the context of a custom field value in an invoice; and

Invoice CF Value Set Value 3327, in some embodiments to set the value of a custom field value in an invoice.

FIG. 34 shows a database diagram 3400 including the transaction database 228, PO database 2500, buyer invoice database 3300, seller invoice database 3400, requisition database 2700, receipt database 2800, sales order database 2900, workflow database 3000, and contracts database 3200, associated with the transaction database 228.

In an embodiment, the seller invoice database 3400 includes one or more of:

- Invoice Configuration Section Title Help 3401, in some embodiments help information for configuring an invoice section title;
- Invoice Configuration Group Title Help 3402, in some embodiments help information for configuring an invoice group title;
- Invoice Configure Element Validation 3403;
- Invoice Configuration Section 3404, in some embodiments configuration of an invoice section;
- Invoice Configuration Group 3405, in some embodiments configuration of an invoice group;
- Invoice Configuration Element 3406, in some embodiments configuration of an invoice element;
- Invoice Configuration 3407, in some embodiments configuration of an invoice;
- Invoice Configuration Version 3409, in some embodiments configuration version of an invoice;
- Active Invoice Configuration Version 3410, in some embodiments configuration of an active invoice;
- Supplier 3411;
- Currency Exchange Rates 3412, in some embodiments currency exchange rates associated with an invoice;
- Invoice 3413;
- User Default Remit To Address 3414, in some embodiments a default remit-to address for a user associated with an invoice;
- Invoice Line 3415;
- Remit To Address 3416, in some embodiments a remit-to address associated with an invoice;
- Invoice Line Product 3417; and
- User 3418.

FIG. 35 shows a database diagram 3500 including the end user database 232, associated with the user/security database 3500. In an embodiment, the user/security database 3500 includes one or more of:

- User Info 3501, in some embodiments information relating to a user;
- User Permission Index 3502, in some embodiments an index of permissions relating to a user;
- User Audit Trail 3503, in some embodiments a list of changes (audit trail) for a user for auditing purposes;
- Users 3504;
- User Attribute Value 3505, in some embodiments the value of an attribute associated with a user;

User Role Membership **3506**, in some embodiments membership associated with a user role;  
 Organization **3507**;  
 Organization Attribute Value **3508**, in some embodiments a value of an attribute associated with an organization;  
 Department **3509**;  
 Position Department Relationship **3510**, in some embodiments a relationship between a position and a department;  
 Position Department Role Relationship **3511**, in some embodiments a relationship between a position and a department role;  
 Position **3512**;  
 Role Attribute Value **3513**, in some embodiments the value of an attribute associated with a role;  
 Role **3514**; and  
 Role Audit Trail **3515**, in some embodiments a list of changes (audit trail) for a role for auditing purposes.

FIG. **36** shows a database diagram **3600** including the scheduler database **3600**. In an embodiment, the scheduler database **3600** includes one or more of:

Job Input Data **3601**, in some embodiments data relating to a job input;  
 Job Description **3602**, in some embodiments a description relating to a job;  
 Job Execution Instance **3603**, in some embodiments an execution instance relating to a job;  
 Job Input **3604**;  
 Job Output **3605**;  
 Trigger **3606**;  
 Filed Description **3607**;  
 Job Output Data **3608**, in some embodiments data relating to a job output;  
 File Data **3609**;  
 Instance **3610**; and  
 Lock **3611**.

FIG. **37** is a block diagram of a server system **3700**. The system **3700** comprises an electronic procurement (eProcurement) server **3720**, located at an eProcurement provider **20** as previously described. The server **3720** is coupled, either locally or remotely, to a database/storage **3760** that hosts a plurality of databases. These stored databases can include one or more of a catalog database **2400**, a staging database **3100**, a buyer/end user database **232**, permissions **3734**, a business rules database **3756**, requirements **3732**, quotas **3750**, and other databases as described. In some embodiments, the catalog database **2400** can correspond to a master product database **236** as described earlier.

In some embodiments, the server **3720** can include one or more of a web server **225**, a middleware/methods server **224**, a transaction processing server **223**, a custom database server **222**, and an end user processing servers **221**, as described earlier.

In some embodiments, the electronic procurement system includes a plurality of purchasing organizations, each having at least one user (e.g., users **3702**, **3703**, **3705**) with permissions **3734** associated with the at least one user. In some embodiments, the permissions are determined in accordance with business rules **3756**. In some embodiments, the business rules are associated with at least one of supplier requirements, purchaser requirements, and governmental requirements **3732**. In some embodiments, the permissions are determined by a super-user as described earlier, e.g., super-user **3704**.

In some embodiments, the permissions **3734** associated with the user **3702** determine the user's ability to purchase from the catalogs **2400** associated with suppliers, and also to purchase non-catalog items. The permissions define a par-

ticular user's ability to purchase items based on such criteria as the amount (e.g., dollar limit or number of purchases), type (e.g., lab/office supplies only or electronic/consumer/personal items also), and priority of items (e.g., speed of fulfillment) the user can purchase.

FIG. **37** shows a first user **3702**, a second user **3703** and a third user **3705**, who access the server system through an internet connection, which in one embodiment is a web connection **3755**.

Business rules **3756** are associated with the plurality of users (users **3702**, **3703** and **3705**). The business rules associated with each respective user may be different. In some embodiments, these business rules determine user permissions **3734** as described, workflow steps and operations, order submission, order approval, and order payment, etc.

Catalog items from catalog database **2400**, and also non-catalog items, are displayed to a respective user in accordance with the respective business rules associated with the respective user. If a business rule prohibits a user from viewing a certain item, category, or supplier, then the respective item, category or supplier will not be displayed to that user, even if other users with appropriate permissions may see it.

Throughout this application, "displaying" means at least that the server sends data for display to a client associated with the user. Prior to display, the data for display may be formatted by the server prior to sending to the client associated with the user, or may be formatted by the client after receiving the data, or may include a combination of these operations.

A first item **3761**, a second item **3762**, and a third item **3764** are displayed to respective users **3702**, **3703** and **3705** in accordance with the business rules **3756** and permissions **3734**. The users submit respective purchase requests **3766**, **3768**, and **3770** to purchase the respective items.

Following a purchase request, a purchase approval is determined **3714** (in some embodiments as an individual operation per item, or by group of items) for the catalog items displayed to the users and selected by the users for purchasing. In some embodiments, the purchase approval can be performed when a user submits a request to purchase the item (respective purchase requests **3766**, **3768** and **3770**), or later (e.g., when a purchase request is routed to an approving party for approval). The permissions **3734** associated with a user may determine a purchasing amount that a user may purchase before approvals are required (e.g., purchase up to \$25 without approval) as an individual transaction or an aggregate transaction over time (e.g., \$100 total purchases per month).

A purchase order is generated (in some embodiments, following a purchase approval) **3718**, **3722**, **3723** respectively for the purchase requisitions **3766**, **3768**, **3770** respectively. Suppliers **3724**, **3726**, **3727** may be associated with the purchase orders **3718**, **3722**, **3723** respectively.

The purchase orders may be combined into a large purchaser order or maintained separately, according to business rules. As an example, if the users **3702**, **3703**, **3705** are at the same purchasing organization, and the items for purchase all come from one supplier, then in some embodiments it would be appropriate to have one purchase order for all three items ordered. In some embodiments, government and supplier requirements **3732** determine if some items (e.g., special items such as radioactive materials, toxins, biohazards, select agents) must have their own separate purchase requisitions and/or purchase orders.

In some embodiments, the purchases may be scheduled **3728**, in accordance with scheduling rules **3730**.

In some embodiments, the business rules are specified by a super-user **3704**. The super-user **3704** may be a system

administrator or manager at a purchasing organization associated with the users **3702**, **3703**, **3705**. The super user **3704** determines the permissions **3734** associated with the users and the business rules **3756** applicable to the users and the purchasing organization. In some embodiments, the business rules and/or permissions include a procurement policy and purchasing permissions **3763**. The purchasing permissions may include definitions of purchasing approval ability and purchasing limits for users. Purchasing approval ability determines which user can purchase or approve what type of item (e.g., only managers can purchase toxins or radioactive items). Purchase limits determines who can approve a purchase and to what dollar amount (e.g., any purchase requisition over \$25 needs management approval), as described.

In some embodiments, the business rules **3756** may be customized according to at least one of a group consisting of by user (as described), by role, and/or by department. For example, certain classes (job roles) of users (e.g., lab technicians) may have business rules associated with that class, and different classes of users (e.g., senior scientist) may have different rules associated with their job role. In another example, users associated with a first department (e.g., engineering) may have different permissions (e.g., ability to purchase engine parts) associated with them than users associated with a second department (e.g., accounting, having permission to purchase calculators.)

In some embodiments, the business rules **3756** and/or permissions **3734** may have an option to prevent approval by a user of his or her own purchase request, in accordance with the business rules. This option may be enabled by user, by role, and/or by department, as described. This option may reduce inappropriate use (e.g., unauthorized personal purchases) of the electronic procurement system **20**. In this case, if a user submits a purchase request for an item, the purchase request is routed for approval by a person other than the user (in some embodiments, more senior than the user), even though the user may otherwise have sufficient purchasing ability (within the user's purchasing limit) to purchase the item without approval.

In some embodiments, business rules **3756** and/or permissions **3734** may have an option to prevent approval by a user of his or her own purchase request over a spending limit, in accordance with the business rules. As described, a user may have permission to purchase up to a certain amount (as described) without requiring approval, as determined by business rules and permissions.

In some embodiments, the business rules are stored at the server **3720**. In some embodiments, the purchase requisitions (**3766**, **3768**, **3770**) and purchase orders (**3718**, **3722**, **3723**) are stored at the server.

In some embodiments, the supplier (e.g., **3724**, **3726**, **3727**) to which a purchase order is assigned is determined according to a procurement policy and with contractual agreements. For example, a purchasing organization may obtain a quantity discount if a quota **3750** of units is purchased from a particular supplier. In this instance, purchase orders may be preferentially assigned to that supplier to meet the quota and obtain the discount. Similarly, contracts may require that certain types of items be ordered from contracting suppliers. In some embodiments, items may be preferentially displayed to users based on quotas of purchases to be filled. In some embodiments, generating a purchase order includes associating workflow rules with the purchase order, in accordance with business rules.

In some embodiments, items (catalog and non-catalog) are displayed to a user in accordance with the respective business rules **3756** associated with the respective items. In some

embodiments, items (catalog and non-catalog) are displayed to a user in accordance with the respective business rules associated with the supplier.

FIG. **38** is a block diagram of a server system **3800**. The server system **3800** includes users (**3702**, **3703**, **3705**), items (**3761**, **3762**, **3764**), purchase requests (**3766**, **3768**, **3770**), purchase approval **3714**, purchase orders (**3718**, **3722**, **3723**), suppliers **3724**, **3726**, **3727**, and purchase scheduling **3728**, as described.

FIG. **38** illustrates a schematic of an exemplary graphical dashboard **3830** displaying status for the purchase requisition, purchase approvals, and purchase orders as described. A purchase request made status **3810** shows whether a purchase request has been submitted for a user or item. A purchase approved status **3812** shows if a purchase request for the user has been approved. A purchase order generated status **3814** shows if a purchase order associated with the user has been generated. In some embodiments, the status information is determined by checking one or more of the Purchase Order Database **2500**, the Purchase Order Workflow Activity History **2510**, Purchase Order User Selected Approver **2536**, and Purchase Order Pending Actions **2538**. A purchase scheduled status **3816** shows if a purchase associated with the user has been scheduled. A purchase fulfilled status **3818** shows if a purchase associated with the user has been fulfilled. An invoice paid status **3820** shows if an invoice associated with the user's purchase has been paid.

In some embodiments, these statuses may be associated with a user, an item, or a supplier. The status are displayed on the graphical dashboard **3830** (in some embodiments generated at the server **3720** but displayed at a user's client), including on a sales order queue **5300**, a graphical display of sales orders status, which is described below in FIG. **53**. The displaying includes presenting on the graphical dashboard approval, purchasing and fulfillment status for the item. In some embodiments, the graphical dashboard is dynamically generated at the server **3720** in accordance with business rules **3756** stored at the server, as described.

FIG. **39** shows a block diagram of a process flow implemented at a server system **3900**. A user **3702** accesses the server system **3900**, and attempts to order a product that is not available. The server system **3900** includes a purchase request **3766**, a purchase approval **3714**, a purchase order generation **3718**, and a purchase scheduling **3728** as described. Server system **3900** also includes server **3720** and databases **3760** as described. The databases include catalog database **2400**, permissions **3734**, a business rules database **3756**, requirements **3732**, scheduling rules **3730**, and other databases as described.

In FIG. **39**, the user **3702** requests access to a first item **3902**. The first item **3902** may be a catalog or non catalog item associated with the electronic procurement system. If the first item is unavailable **3904**, a second available item **3906** corresponding to the first item **3902** is identified. The second item could be a similar item as identified in the catalog **2400**, or could be a non-catalog item. An available item is one that is in stock at a supplier or at an internal stockroom, and may be ordered for prompt delivery. An unavailable item includes one that is out of stock, back-ordered, discontinued, or one that cannot otherwise be delivered promptly via the electronic procurement system.

The second available item **3906** is displayed to the user in accordance with business rules **3756** associated with the user. In some embodiments, the business rules are associated with the item. In some embodiments, the business rules are associated with a supplier of the item.

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The user submits a purchase request **3766** for the second available item **3906**, and a purchase approval **3714** is determined. A purchase order **3718** is generated for the item. The purchase order may be associated with a supplier **3724**. The purchase request may be scheduled **3728**, all as described.

FIG. **40** shows a block diagram of an e-procurement process flow operating on a server system **4000**. Server system **4000** also includes server **3720** and databases as described. The databases include catalog database **2400**, permissions **3734**, a business rules database **3756**, requirements **3732**, scheduling rules **3730**, and other databases as described.

In FIG. **40**, first user **4002** submits a purchase request **4010** to the server for an item **4006**. The item **4006** may be a catalog item (e.g., an item from catalog database **2400**) or non catalog item associated with the electronic procurement system. A second user **4004** also submits a purchase request **4012** to the server for the same item **4006**. In some embodiments, the second user is from the same organization as the first user.

A determination is made (**4013**) whether there is sufficient stock of the item available to fulfill both user purchase requests. If there is insufficient stock of the item available to fulfill both purchase requests, the user purchase requests are prioritized (**4014**). If there is sufficient stock, then purchase orders may be generated (**4018**) without prioritizing. Prioritizing (**4014**) can include determining which user request (if any) is highest priority, as described. In some embodiments, user requests of a similar priority level are filled according to a first in, first out (FIFO) method. In some embodiments, one or both of the user purchase requests are placed in a queue (**4016**) according to the prioritizing. One or more purchase orders **4019**, **4020** are generated (**4018**).

In some embodiments, prioritizing the user purchase requests is performed in accordance with the importance of a respective project or task associated with each respective user. In some embodiments, importance may include factors such as remaining schedule, amount of budget, including budget overruns, proximity to deadlines or milestones, and other business or project management factors.

In some embodiments, user purchase requests of a similar priority level in the queue are fulfilled according to a first in, first out (FIFO) method. In some embodiments, the order of insertion of a purchase request into the queue is determined by prioritizing **4014**. In this case, the prioritizing may include sorting purchase orders into priority groups, which are then inserted into the FIFO in order of priority group. A highest priority group is placed in the FIFO first, a next highest priority group goes next into the FIFO, and finally a lowest priority group goes into the FIFO last.

In some embodiments, a user having an order in the queue **4016** is notified **4021** when the ordered item is ready for fulfillment **4020**. In some embodiments, this occurs when the item **4006** is delivered by supplier **3724**.

In some embodiments, an alternative available item **3906** (as described) is presented (**4023**) to a user **4004** having an order in the queue, in accordance with a predicted fulfillment delay. For example, if a user has already placed an order, and the electronic procurement system determines that the already-placed order will be delayed, an alternative item may be presented to the user as described in reference to the process flow **3900**. The alternative item may be presented as an item to be ordered from an external supplier or an item from an internal stockroom. In some embodiments, where the original (unavailable) item **4006** was already approved for purchase, the alternative item **3906** may not require submission of a purchase request, approval, etc. since it is a substitute for the originally approved item.

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In some embodiments, the prioritizing is performed according to fees associated with the respective users. In some embodiments, a purchasing organization (buyer) may choose to subscribe or pay for a higher lever of service, including receiving preferential ordering position for a short-supply or allocated product. Tiers of service may be implemented in the electronic procurement system, where lower tier (lower paying or free) users of the system receive lower priority service than premium (higher fee paying) users. In some embodiments, if an item is in short supply, the purchasing process may become a bidding or auction process, whereupon users submit orders as bids.

In some embodiments, prioritizing (**4022**) may be performed upon fulfillment of the item order (**4020**), in addition to or instead of at the time of order. Upon fulfillment (delivery of the item), a determination may be made whether there is sufficient stock of the item available to fulfill both user purchase requests **4010** and **4012**. The prioritized requests may be placed (**4024**) in a fulfillment FIFO or queue. The prioritized requests may be fulfilled according to the priority.

In some embodiments, if at time of delivery an alternative item comparable with the requested item is available, and the requested item is not available in sufficient stock to satisfy both the first user request **4010** and second user request **4012**, one or more of the user purchase requests may be fulfilled with the alternative item. For example, if a first user A and second user B each order one ten-pack of notepads, the delivery fulfillment might include just one ten-pack and one twelve-pack. In this delivery, the twelve-pack is an alternative item comparable with the requested item ten-pack (as it can provide at least ten notepads, even if there are two left over), so the twelve pack can be used to fulfill the purchase request for a ten pack, as a substitute.

FIG. **41** illustrates an exemplary data structure **4100** for an inventory of an item. In some embodiments, this data structure is stored in the item database **2410**, in the master database **236**, at the eProcurement server **20**. In some embodiments, the inventory data structure could be stored at a purchaser server, or at a purchaser client. The data structure may include purchase prices **4012**, purchase quantities **4104**, dates of purchase **4106**, average cost of items per purchase **4108**, shelf age of each purchase **4110**, markup to be added to each purchase **4112**, sale price **4114**, and inventory **4116** of the item. An exemplary history of purchases (**4118**, **4120**, **4122**, **4124**) is shown also. An exemplary sale history may also be included in the data structure.

In some embodiments, by analyzing a series of user purchases of an item (e.g. history **4118**, **4120**, **4122**, **4124**), a property (such as cost, time in inventory, spoilage status, etc.) per item purchased is determined. Inventory **4116** is managed (by the server, or by a user accessing the server) based on the property per item. The managing includes making decisions to purchase items to replenish inventory, to deplete inventory in order to sell items by a 'best before' date, determining pricing to achieve a desired markup, etc. In some embodiments, the property per item is a cost per item purchased (e.g. average cost **4108**). The average cost may be calculated by dividing the purchase price **4102** (total) by the quantity purchased **4104**.

In some embodiments, the cost per item includes a holding cost per unit of that item. This holding cost can include depreciation, value reduction due to obsolescence, shrinkage, reduction of remaining shelf life, etc. In some embodiments, managing includes determining a sale price per item **4114**, based on the cost per item **4108** and a markup **4112**. In some embodiments, the managing is performed by a user at the purchaser using manage purchases engine **1533**. The sale

price may also be reduced in accordance with shelf age **4110**. The shelf age may be calculated by subtracting the date purchased from the current date to find the number of days since purchase of that batch of items. The sale price **4114** may be calculated by multiplying the average cost per item **4108** by the markup **4112**.

In some embodiments, the property per item is a spoilage status, based upon an average holding time per item. This is used for food, medicines, and organics that have 'best before' date. In some embodiments, the property per item is velocity of purchases and/or velocity of sales for that item. In some embodiments, the property per item is a predicted out-of-stock time based upon the velocity of purchases and a velocity of sales.

The categories and values described here are exemplary, and other properties and calculations could be used to achieve the result of managing inventory.

FIG. **42** shows a block diagram of a process flow, implemented at a server system **4200**. The process flow shows an e-procurement process for identifying a discrepancy between a purchase document and an invoice.

Server system **4200** also includes server **3720** and databases as described. The databases include catalog database **2400**, permissions **3734**, a business rules database **3756**, requirements **3732**, scheduling rules **3730**, and other databases as described.

A supplier invoice **4210** is received by the electronic procurement system. In response to the receiving, a purchase document corresponding to the invoice is identified (**4230**). Purchase documents may include one or more of a purchase request **4212** and a purchase order **4214**. The content of the purchase document is compared (**4216**) to the supplier invoice **4210**. A discrepancy is identified (**4217**) between the purchase document and the invoice. A notification is generated based upon the identified discrepancy, and may be sent to a user associated with the purchase order **4212** or request **4214**. The notification can include an online dispute notification **4222**, a request for payment approval **4224**, or a notification of automatic payment (**4226**).

The discrepancy check **4217** compares properties such as price, quantity, and delivery date **4220** between the purchase documents and the invoice. In some embodiments, identifying a discrepancy includes determining if a property associated with the invoice is outside of a tolerance range **4218**. The tolerance range may be specified by business rules **3756**. If the discrepancy between the purchase document and the invoice is above a threshold (e.g. percentage mismatch, dollar value, number of days late, number of defects, etc.), then the dispute notification **4222** is sent to the supplier, and in some embodiments to a user associated with the purchase request and purchase order. In some embodiments, the supplier and a purchaser associated with the invoice may access an online dispute resolution mechanism **4222**, which may be hosted at the electronic procurement system. If the discrepancy is minor, the invoice can be sent to the user with a request for payment approval **4224**, i.e. a request to verify that the match is correct. If there is no discrepancy, then the invoice is sent for automatic payment **4226**.

The discrepancy check **4217** can include performing at least a two way match between the invoice and the purchase document. A two way match is where one of the purchase request **4212** and purchase order **4214** are matched with the invoice **4210**. In some embodiments, the discrepancy check **4217** can include performing a three way match, including: comparing both the purchase request **4212** and the purchase

order **4214** to the invoice **4210**. In some embodiments, delivery documents may be compared with the purchase documents and the invoice.

In some embodiments, identifying a discrepancy (**4216**) includes determining if an alternative item comparable with the requested item has been delivered. If the purchase order or request has been satisfied by the alternative item, then the purchase request or purchase order may be treated as satisfied and the invoice paid by the user. For example, if a twelve pack of notepads is delivered instead of a ten pack, as described.

FIG. **43** is an exemplary screenshot **4300** of a workflow configuration user interface, generated by workflow management engine **1680**. A super user or administrator uses this interface to configure steps and operations associated with a workflow. This configuration is typically performed at the super user's client, and the configuration data is saved at the eProcurement system **20**.

Window **4310** shows status items for a particular step in the workflow. Save option **4330** allows changes to the workflow to be saved. Steps **4320** shows steps in the workflow associated with a purchase or operation. Import button **4340** allows workflow steps to be imported. Export button **4345** allows workflow steps to be exported. These workflow steps are stored in the workflow database **3000**, in at least workflow step **3002**.

FIG. **44** is an exemplary screenshot **4400** of an advanced dynamic workflow setup rule group menu, generated by workflow management engine **1680**. This interface is used by a super user or administrator to setup rule groups, and changes are stored at the eProcurement system **20**, as described. Changes are made to the workflow dynamic rule group **3034**, and workflow dynamic rule group audit trail **3036**, both stored in workflow database **3000**.

In this menu, groups are used for easy reference and organization of individual rules. Groups are referenced within the workflow configuration. The menu includes workflow tabs **4410** to navigate through the workflow options. A create new rule group button **4415** allows creation of new workflow rules. A rule group list **4420** shows created rules. An edit selected rule group menu **4430** allows a user to select individual rule groups for editing. A pair of save and delete buttons **4435** allow changed rules to be saved or rules to be deleted.

The rule management operations described (as follows) in FIGS. **45**, **46**, **47** may be performed using one or more of the Workflow Folder Selection Rule **3014**, Workflow Dynamic Rule Group **3034**, Workflow Dynamic Rule Group Audit Trail **3036**, Workflow Dynamic Rule **3038**, Workflow Dynamic Rule Element **3040**, and Workflow Dynamic Rule Audit Trail **3042**, in workflow database **3000**, shown in FIG. **30**. Product rule management may be performed using Product Rule **3122**, from summary search database **3130**, shown in FIG. **31**. The menus described in FIGS. **45**, **46**, **47** are accessed by a super user or administrator when configuring the workflow rules, and changes are stored at the eProcurement system **20**, as described. The menus described are generated by the workflow management engine **1680**, residing on the eProcurement system **20**.

FIG. **45** is an exemplary screenshot **4500** of a rules management setup menu. This menu allows rules controlling workflow operations to be specified by the super user or administrator. In this menu, rules can be created at the header and line item levels. Rules can be created and updated on an ad-hoc basis, since only the rule group is referenced in the workflow configuration. Approvers can be assigned to rules on an ad-hoc basis. Numerous rule types are supported including document total value, department, accounting

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codes, custom fields setup by the organization for the document, form type, line amount, line commodity code, and others.

The rules management setup menu includes workflow tabs **4510** to navigate through the workflow options. A rule information menu **4515** shows information regarding a particular rule. An approver menu **4517** shows approvers for a rule and allows approvers to be added and removed. A document level rules menu **4520** allows rules to be specified per document, via a drop down menu **4525**. A line level rules menu **4530** allows rules to be specified per line item, via a drop down item **4535**.

FIG. **46** is an exemplary screenshot **4600** of an assign rule to group menu. In this menu, multiple rules can be assigned to a single group by the user or super user. This offers flexibility in being able to add/modify/delete rules to workflow without having to change the workflow configuration since the configuration references a Rule Group and not the rules themselves.

The assign rule to group menu includes workflow tabs **4610** to navigate through the workflow options. An add rule button **4615** allows a new rule to be added. A rules menu **4617** shows rules assigned with a particular group. The rules menu includes a rule group field **4620**, a rule name field **4622**, a rule description field **4624**, and a select field **4626**. Drop down menus **4630** and **4632** allow actions to be selected for a rule or rules.

FIG. **47** is an exemplary screenshot **4700** of an import/export rules group menu. In this menu, individual rules and groups of rules can be imported or exported by a super user or administrator to facilitate integration with other systems. Additionally, groups and rules can be ported via electronic file between application environments, such as from test to production environments. In some embodiments, the groups and rules are ported as an XML based file.

The import/export rules group menu includes workflow tabs **4710** to navigate through the workflow options. A request menu **4715** allows import or export actions to be initiated. An action drop down menu **4720** allows a user to select a desired action. A recent activity window **4730** shows recent import/export requests submitted. Import instructions **4725** assist a user in importing rules.

FIG. **48** is an exemplary screenshot **4800** of an item setup menu within a supplies manager application. This menu allows key attributes of an item to be managed and pricing for fixed pricing items to be managed. This menu is generated at the eProcurement server **20**, in some embodiments by the catalog management engine **1695** and/or the catalog module **2120**. The menu is accessed by a user (or super user) at the supplier when setting attributes and pricing for items. Attributes and prices for items, set using the item setup menu, are stored at the catalog database **2400**, under items data base **2401** (for individual item attributes) and price database **2430** (for prices associated with items).

The item setup menu includes workflow tabs **4810** to navigate through the supplies manager options. The attribute value menu **4820** includes the following fields:

- Part number **4822**, a part number for the product;
- Product Description **4824**;
- Packaging UOM **4826**, unit of measure for packaging;
- Product Size **4828**
- Product Color **4830**;
- Status **4832**, the status relating to a product (e.g., available, unavailable, backordered, etc);
- UNSPSC **4834**, the United Nations Standard Products and Services Code, where UNSPSC is a coding system to

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classify both products and services for use throughout the global eCommerce marketplace;

Category **4836**, for product category;

Searchable Keywords **4838**, keywords or tags best describing the product that are used as hits for a user search;

Manufacturer Name **4840**;

Manufacturer Part Number **4842**;

Long description **4744**, a detailed description of the product;

Lead Time **4846**, expected time between ordering and receiving the item;

UPC **4848**, the universal product code (barcode) for the product;

More Information URL **4852**, URL link to more information about the item;

Image URL **4854**, product image URL;

MSDS URL **4856**, material safety data sheet URL;

Technical Data Sheet URL **4858**, a URL link to a datasheet for the item;

Is Recycled? **4862**;

Is Controlled Substance? **4860**, a flag indicating a potential controlled substance such as certain drugs, opiates, etc.;

Is Hazardous Material **4864**, a flag indicating a potential hazardous (e.g., biohazard, fumes, etc) item;

Is Radioactive? **4866**, a flag indicating a potential restricted radioactive item;

Is Minor Radioactive? **4868**, a flag indicating a potential restricted radioactive item;

Is Toxin? **4872** a flag indicating a potential toxic substance such as poison;

Is Select Agent? **4870** a flag indicating select agents, which are pathogens or biological toxins that have been declared by the U.S. Department of Health and Human Services or by the U.S. Department of Agriculture to have the "potential to pose a severe threat to public health and safety"; and

Upload new image field and button **4874**.

A create new item button **4880** and copy standard data to new button **4882** are also present.

FIG. **49A** is an exemplary screenshot **4900** of a setup inventory attributes menu. In this menu, inventory parameters are inherited from the fulfillment center where the item is stocked. The parameters can be overridden at the item level as necessary. The parameters drive replenishment functionality. This menu is generated at the eProcurement server **20**, in some embodiments by the catalog management engine **1695** and/or the catalog module **2120**. For non-catalog items, it may be generated using a purchasing engine **1681**. The menu is accessed by a user (or super user) at the supplier when setting attributes for inventory. These inventory attributes are stored at the catalog database **2400**, under item inventory config **2526**, and changes are stored in item inventory config audit trail **2428**.

The setup inventory attributes menu includes workflow tabs **4910** to navigate through the workflow options. A fulfillment address menu **4920** shows an address for a supplier. An inventory parameter menu with tabs **4930** allows navigation through the inventory options.

The inventory parameter menu **4930** includes the following fields:

Minimum inventory level **4932**;

Maximum inventory level **4934**;

Reorder point **4936**; and

Economic Order Quantity **4938**.

A select box menu to override default values **4940** is also present.



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In some embodiments, the item attribute/parameter management may be performed using the items database **2401**, including Item Inventory Config **2426** for configuring inventory of an item, and Item Inventory Config Audit Trail **2428** for tracking changes in inventory configuration.

FIG. **49B** is an exemplary screenshot **4950** of an item setup pricing menu. In this menu, a pricing model is inherited from the fulfillment center default pricing model. The pricing model can be overridden at the item level. In some embodiments, the pricing models may include fixed (price is constant), FIFO (First in first out—price is based on cost of items plus a markup using a FIFO model, e.g., the price for an item is the price of the oldest one in inventory plus a markup), and cost averaging where the price of an item is based on the average cost of all of the item in inventory plus a markup.

In some embodiments, the item pricing management may be performed by a user (or super user) using the price database **2430**, including Price Set **2440** (a price for the item), Price Version Approval **2442**, and Price Version **2444** (a version of a price associated with the item). This menu is generated at the server **20**, in some embodiments by the catalog management engine **1695** and/or the catalog module **2120**. For non-catalog items, it can be generated using a database management module **2170**. The menu is accessed by a user (or super user) at the supplier when setting attributes and pricing for items. Attributes and prices for items, set using the item setup menu, are stored at the catalog database **2400**, under items data base **2401** (for individual item attributes) and price database **2430** (for prices associated with items).

The item setup pricing menu includes menu tab **4955** to navigate through the pricing options. The setup pricing menu **4950** includes a pricing model **4960** with drop down menu **4964** to select the pricing style and a markup percentage **4963**. A select box menu to override default values **4966** and a save button **4968** are also present.

FIG. **49C** is an exemplary screenshot **4970** of an item setup replenishment link menu. In this menu, an item managed in inventory can be linked to one or more e-commerce items or non-catalog items for replenishment. A default item can be configured for use in the replenishment report. This menu is generated at the server **20**, in some embodiments by the purchasing engine **1681**. The menu is accessed by a user (or super user) at the supplier when maintaining an item in inventory.

In some embodiments, the item replenishment management may be performed using the receipt database **2800**. This database includes a Receipt Line Inventory Replenishment field **2818**, which may correspond to an inventory replenishment line for a receipt.

The item setup replenishment link menu includes menu tab **4980** to navigate through the replenishment options. The setup replenishment link menu **4980** includes a set preferred supplier button **4982**, a supplier field **4984**, an item name field **4986**, a catalog number field **4988**, a size field **4990**, a unit of measure field (UOM) **4992**, a stocked units field **4994**, and a price field **4996**. Selecting any of these buttons updates the items database **2401** and/or the price database **2430**.

FIG. **50** is an exemplary screenshot **5000** of a supplier setup inventory parameters menu. This menu is generated at the eProcurement server **20**, in some embodiments by the sales management engine **1760**. The menu is accessed by a user (or super user) at the supplier responsible for setting parameters for sales inventory.

In this menu, inventory parameter defaults can be set for all items stocked within the fulfillment center. The quantity on hand or in/out of stock displayed in search results is configured. Default parameters for fulfillment for all sales orders

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managed at this fulfillment center are configured. Default parameters for pricing models for items stocked in the fulfillment center are configured. A location hierarchy is configured, e.g., shelves, bins, etc. Kiosk (self-checkout) parameters are configured.

The supplier setup inventory parameters menu includes menu tabs **5010** and **5020** to navigate through the inventory options. A supplier label **5005** shows an internal stockroom as the supplier. A kiosk tab **5040** shows options associated with a self-checkout option. A price tolerance select box **5050** allows selection of a price tolerance. An auto-allocate backordered items box **5060** allows back ordered items to be allocated.

FIG. **51** is an exemplary screenshot **5100** of a search results menu. This menu is generated at the eProcurement server **20**, in some embodiments by the purchasing engine **1681** and/or catalog engine **1655**. The menu is accessed by a user at the purchaser when ordering items and monitoring stock of items. In this menu, both internally stocked (stockroom) and external vendor products are searched upon and shown in results. The menu displays whether an item is in/out of stock for internally stocked items in the stockroom, and actual quantity on hand can be seen.

Supplier name and/or an icon **5110** may be used to indicate that an internal stockroom holds the searched items (staplers). Add to active cart option in drop down menu **5112** allows a user to select items to be added to a shopping cart.

FIG. **52** is an exemplary screenshot **5200** of a shopping cart menu. The menu is generated at eProcurement server **20**, and is accessed by a user at the purchaser when ordering items, e.g., an individual user with purchasing permissions or a purchasing department. In this menu, both internally stocked/fulfilled and external vendor products are ordered using the same interface. Stocked and external vendor products can be part of the same requisition.

An add non-catalog item button **5205** allows non-catalog items to be added to the cart. A first line item **5210** shows a product description **5215** from an external supplier. A supplier information window **5230** shows contract, purchaser order, and quote details for the external supplier. A second line item **5220** shows a product description **5225** from an external supplier. A drop down menu **5235** allows actions (e.g., add to favorites) for selected suppliers.

FIG. **53** is an exemplary screenshot **5300** of a sales order queue. In this menu, sales orders are routed to the appropriate departments, users, and queues depending on organization-specific rules. This menu is generated at the eProcurement system **20** using a rules based sales engine **1760**, in some embodiments similar to engines used for other documents, e.g., requisitions and purchase orders using purchasing engine **1681**. The sales order queue is accessed by a user at a supplier when monitoring or managing sales order status.

Allocation status and shipment status are shown. Backorder and other exceptions for the sales order are shown. Order fulfillment is performed from this screen.

The sales order queue includes a workflow tab **5305** to navigate through the workflow options. An approval filter **5310** allows sales orders to be filtered. A 'my sales orders' menu **5315** shows sales orders associated with a particular user. An open sales orders menu shows sales orders that are in progress. The sales orders menus include fields for sales order information **5328**, purchase order number **5330**, department **5332**, priority **5334**, date/time **5336**, buyer information **5338**, assignee information **5340**, allocation information **5340**, warning information **5344**, shipment status information **5346**, assignment information **5348**, and a select box **5350**.

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FIG. 54 is an exemplary screenshot 5400 of a picking/packing slip. This slip menu shows where items are to be picked from within the internal stockroom, and shows delivery information and line item status. The menu is generated at the eProcurement server 20, in some embodiments accessing the purchase order database 2500, and is accessed by a user at the purchaser responsible for receiving ordered (fulfilled) items when they arrive in stock.

Location field 5405 shows the location of the internal stockroom. Buyer window 5415 shows buyer information. Ship to window 5420 shows shipping information; here it is the same as the supplier (internal stockroom). Bill-to window 5425 shows billing information, here it is the same as the supplier. Line item window 5430 gives a line item description of items ordered.

FIG. 55 is an exemplary screenshot 5500 of a purchase order status/acknowledgement. The menu is generated at the eProcurement server 20 by purchase engine 1931, in some embodiments including order entry module 1933 and order approval module 1934, and is accessed by a user at the purchaser responsible for ordering items. In some embodiments, the eProcurement server 20 accesses the purchase order database 2500 to determine purchase order status. This menu shows purchase order statuses within the purchase order user interface. Delivery, backorder, and related information are shown here. The status is automatically updated based on fulfillment activities within the stockroom.

The purchase order status/acknowledgement includes workflow tabs 5505 and 5510 to navigate through the workflow options. General information window 5515 gives details regarding an order, and document status window 5530 gives details of documents relating to the order. A line item status window 5520 shows the status of each line item. A backorder warning field 5525 shows that an item is backordered.

FIG. 56 is an exemplary screenshot 5600 of a replenishment report. The menu is generated at the eProcurement server 20, in some embodiments by the purchasing engine 1681 accessing requisition database 2700, and is accessed by a user at the purchaser when managing the inventory of items. This menu shows all items requiring replenishment (restocking). The quantity to order based on inventory parameters (MAX, ROP, EOQ), quantity on hand, on order, and backordered, is automatically populated into a purchase request. In some embodiments the automatic population is performed by a robot as described in FIG. 75. In some embodiments, this automatic population is performed by Invoice, PO, Order, Requisition Module (2082, FIG. 20).

The replenishment report includes menu tab 5605 to navigate through the replenishment options. Quantity on hand field 5620, quantity on order field 5622, pending sales order field 5624, quantity on backorder field 5626, preferred supplier field 5628, preferred item number field 5630, price field 5632, quantity box 5634, and add to cart icon 5636 are also shown.

FIG. 57 is an exemplary screenshot 5700 of a replenishment order. This menu shows an order marked as a replenishment order. The order is generated at the eProcurement server 20, in some embodiments by the requisition fulfillment engine 1686 accessing requisition database 2700, and is accessed by a user at the purchaser responsible for replenishing inventory items. This order lists inventory item and location where the item is being stocked. Stocked unit conversion can be overridden from item default. For example, conversion may be performed from units ordered, such as case to units sold, where a case of 24 is sold in units of each.

Product description line item 5710 gives details of a particular product. A replenish stock box 5715 allows stock to be

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automatically replenished. A supplier field shows that the supplier is an internal stockroom. A stocked units box 5735 allows a user to enter the number of items to be kept in stock.

FIG. 58A is an exemplary screenshot 5800 of a replenishment receipt. This receipt is generated at the eProcurement server 20, in some embodiments by the requisition fulfillment engine 1686 accessing the receipt database 2800, and is accessed by a user at the purchaser responsible for replenishing inventory items. This menu shows replenishment details, and the default location for an item is automatically populated. In some embodiments, upon receipt, items are automatically placed into inventory in their appropriate location. In some embodiments, items are physically placed (e.g., by an operator with a forklift) into a physical inventory location (e.g., a stockroom or warehouse) and the electronic procurement system is updated accordingly. In some embodiments, an item count is just updated in the electronic procurement system, without any corresponding physical movement of the item by an operator.

The replenishment receipt includes menu tabs 5805 and 5820 to navigate through the receiving options. Add purchase order button 5810 allows a purchase order to be added. Save updates button 5812 allows changes to be saved. Complete button 5814 allows a user to indicate that the receipt is complete. A purchase order number field 5825 specifies the purchase order. The purchase order includes details such as PO line number, product name, catalog number, quantity or units of measure, previous receipts, and quantity ordered. Additional information such as stocked item information (item, item number, stocked units) is shown, along with fulfillment center information (e.g., surplus store) and lot tracking information.

As described, the receipt replenishment may be performed using the receipt database 2800, including Receipt Line Inventory Replenishment 2818, in some embodiments an inventory replenishment line for a receipt.

FIG. 58B is an exemplary screenshot 5850 of a replenishment allocation. This allocation is generated at the eProcurement server 20, in some embodiments by the purchasing engine 1681 accessing the requisition database 2700, and is accessed by a user at the purchaser responsible for replenishing inventory items. This menu shows that sales orders pending backorder for an item are automatically allocated inventory upon receipt of the new inventory.

A create quantity receipt 5852 button and create cost receipt button 5854 allow a user to create receipts based on quantity or cost respectively. Receipt number field 5860 shows that a receipt has been created for a particular PO number. Allocation menu 5870 shows orders that have been allocated, including sales order number, PO number, stocked item, stocked item number, quantity ordered, and quantity allocated.

FIG. 59A is an exemplary screenshot 5900 of a setup folders/automated robots screen. In some embodiments, a robot is an automated set of instructions for performing a specific task, and for supporting the various workflow processes. Several robots exist to perform various tasks. In some embodiments robots are created by the electronic procurement system (or system vendor or creator) and may not be edited by a user. In some embodiments robots, or parameters of the robot, may be edited by a user. Exemplary robots and their tasks are described with regard to FIG. 75. In some embodiment, a robot may perform functions from a script of operations. In some embodiments, a folder is an approval queue within a system. In some embodiments, one or more approvers are assigned to folders, and they are notified when documents are placed within the folder(s) for their review

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and/or approval. In some embodiments folders, or parameters of the folder, may be edited by a user.

This screen is generated at the eProcurement server **20**, in some embodiments by sales/purchase management module **2046** (FIG. **20**) in coordination with information stored in the buyer invoice database **3300** and/or sales invoice database **3400** (FIG. **22**), accessed by invoice requisition module **2082** (FIG. **20**). This screen is presented to a user developing workflow functions and importing or exporting them. In other embodiments, the screens, workflows, folders, and rules described in the following figures could apply to any transaction workflow, such as a purchase workflow, a sales workflow, an invoice workflow, a payment workflow, a shipping workflow, or any other type of transaction workflow.

FIG. **59A** shows an invoice menu tab **5902**, including a workflow folder import/export tab **5904**. A window **5905** is associated with the import/export tab **5904**. This window **5905** includes an export button **5910** that allows a user to export a workflow e.g., to a web location, to a file, to a library, to local storage, etc. The window **5905** includes a browse button **5912** that enables a user to select folders or robots to import. The window **5905** includes a load folders/robots button **5914**, in some embodiments to import an invoice workflow electronic file, including a folders, and/or a robots file. These folders and robots can be imported (e.g., from a web location, a file, a library, a local storage, or a combination of these etc.) and exported (e.g., from the locations described) to facilitate the setup of the invoice workflow. Additionally, folders and robots can be ported via electronic file between application environments, e.g. test to production. In some embodiments, a test environment is a 'safe' environment where new workflows, rules, folders and robots may be created, tested, and verified. When a user is satisfied that the new workflow, etc. is functional and ready for use, the user can then enable the new workflow and put it into production. This may be referred to as moving from test to production.

Thus, a user can develop the functions he needs and test them in a safe (i.e., development) environment, and when the test is successful, port the functions to the active workflow for normal use. An example of this workflow development is illustrated in FIGS. **44-48**, and described accordingly. In some embodiments, the folders and/or robots are XML based files. In other embodiments, the folders and/or robots could be in other related languages such as hypertext markup language (HTML), comma separated variables (CSV), tab delimited text files, name value pairs, or any other markup language, or text based language.

FIG. **59B** is an exemplary screenshot **5920** of a setup workflow process screen. This screen is generated at the eProcurement server **20**, in some embodiments by sales/purchase management module **2046** (FIG. **20**), as described with reference to FIG. **59A**. This screen is presented to a user developing workflow functions and specifying rules associated with the workflow functions.

FIG. **59B** includes a workflow configuration menu tab **5921** and its associated window **5122**. The window **5122** may include an active version window **5924**, a process id window **5928**, a steps window **5931**, and an activities window **5940**. The workflow configuration menu tab **5921** may include an import tab **5921** and an export tab **5946**, for importing and exporting folders and/or robots to and from the workflow, as described.

A active version window **5924** displays a list of workflow versions, and shows the active version. In some embodiment, a user may have one or more versions of a workflow, and may have the option of activating or deactivating versions in order to test a newer version or to revert to an older workflow

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version. In some embodiments, a user has an option of creating a new version or deleting one or more versions of a workflow. In some embodiments, a user may save a current workflow as a new workflow version, so that the user can edit it but leave the original version intact.

A process id window **5928** shows a process identifier, version, creation date, user defined description, and active status, along with save button **5930** for saving changes to the workflow.

A steps window **5931** shows exemplary steps or operations in the workflow robot and/or folder, including non-purchase order approvals **5932**, auto-matching (e.g., of invoices to purchase documents) **5934**, matching exceptions **5936**, and OK (approval) to pay **5938**. In some embodiments, more or fewer operations may be specified. In some embodiments, non-purchase order approval is an approval for a purchase request that does not have an associated purchaser order. In some embodiments, auto-matching is a process whereby a first document (e.g., a an invoice) is compared to a corresponding second document (e.g., a purchase request or purchase order) to find if the amounts, quantities, etc. on the first document and second document correspond. In some embodiments, there may be a tolerance level (e.g., measured in dollar value, percentage of invoice total, percentage of quantity, etc.) within which a match is deemed acceptable. For example, a tolerance of 1% might be permitted on a shipment of items, so that if the invoice and purchase order totals fall within this tolerance range of 1%, the match is deemed acceptable. In some embodiments, a default tolerance range may be provided by the electronic procurement system. In some embodiments, a user may select one or more tolerance values or ranges according to his preferences.

A practical example of where this tolerance would be valuable is where a user orders several items and the shipping cost varies from an expected shipping cost due to (for example) a weight of the items. In this example, a user would probably consider the order satisfied (e.g., a match) even if the shipping cost is slightly different from expected, within a tolerance range. In another example, if a tax rate (e.g., a state sales tax rate) changes slightly, a user would probably consider the order satisfied (e.g., a match) if the invoice price is slightly different from expected due to the change in tax rate, within a tolerance range. In another example, if a first type of unit (e.g. 12 oz beaker) is ordered, but a second item (e.g., 12.5 oz beaker) is delivered, and the delivered beaker is within the cost and/or other tolerance range set by the user, then the order is satisfied (e.g., a match).

An activities window **5940** shows activity names and rules associated with each of the steps. A start instruction **5942** and an end instruction **5944** specify a start and an end respectively for steps associated with a folder and/or robot. A set of rules **5943A-D** describe exemplary rules and conditions associated with them for processing invoices (e.g., purchase invoices and/or sales invoices).

In an exemplary embodiment, rule **5942A** determines if a document needs to be submitted for a non-purchase order approval, i.e., for approval outside of the regular approval process. In an example, rule **5942A** indicates that if a document (e.g., an invoice, a purchase order, purchase requisition, or any other document) has non-purchase order lines (value is true) then the non-purchase order approval workflow is started. In some embodiments, having non-purchase order lines means that a field (e.g., in a database associated with the document) indicates that non-purchase order lines are present, or alternatively, upon running a function on the database, it returns a result indicating that non-purchase order lines are present.

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In an exemplary embodiment, rule **5942B** determines automatic matching of invoices and purchase documents. In an example, rule **5942B** indicates that if a document (e.g., an invoice, a purchase order, purchase requisition, or any other document) does not (value is false) have non-purchaser order lines (as described above) then an automatic matching workflow is started.

In an exemplary embodiment, rule **5942C** determines matching exceptions between (for example) invoices and purchase documents. A matching exception is where (for example) an invoice does not correspond to (match up with) a purchase document, within a specified tolerance range, as described. In an example, if a matching status field (e.g. match status) of a database associated with the document (e.g. document) has a value of unmatched, and is not within a tolerance value of the document (e.g., tolerance status), then a document exception workflow is started.

In an exemplary embodiment, rule **5942D** determines if an invoice payment workflow (e.g., OK to Pay) is to be started. In an example, rule **5942D** indicates that if a match status field (e.g., match status) in a database associated with the document or a returned value from a function performed on the database, has a value of "matched," or if a match status field (or returned value) has a status of "do not match," then the invoice payment workflow is started. This means that if a document (e.g., an invoice) is matched, or if the document indicates that no match is required, then the document should be paid.

In some embodiments, exemplary rules and conditions may be described for processing other business documents such as purchase orders, purchase requisitions, credit memos, receipts, contracts, tax documents, employment documents, or any other financial, governmental, or transactional document.

In some embodiments, the rules are logical statements which, if met, cause the step to be executed. In some embodiments, more complex logical or programming instructions may be used to implement rules in the workflow folder and/or robot.

The setup workflow process of FIG. **59B** allows for the creation of a unique workflow process for invoices and credit memos based on the customer's business processes. The invoice workflow steps are steps that will be visible to end users of the system. In some embodiments, other steps that are only visible to a super-user or system administrator may be specified also. The invoice activities window **5940** allows the administrator or super-user to view the workflow steps and the rules associated with each step. The activities have rules that define which documents will fall into the activity. The invoice workflow configuration can be imported/exported to facilitate the setup of invoice workflow. Additionally, invoice workflow configurations can be ported via electronic file between application environments, e.g. from test to production, as discussed. In some embodiments, this file is XML-based, as described.

FIG. **59C** shows an exemplary screenshot **5950** of an assign approvers screen. This screen is generated at the eProcurement server **20**, in some embodiments by sales/purchase management module **2046** (FIG. **20**), as described with reference to FIG. **59A**. In some embodiments, this screen is displayed to a super-user to assign one or more approvers for a workflow folder. In some embodiments, this screen is displayed to an approver to assign one or more approvers for an invoice.

FIG. **59C** includes a shared workflow folders menu tab **5952**, with an associated window **5953**. The window **5953** includes an apply all changes button **5953**, for applying changes made in the window. The window **5953** also includes

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a create new folder button **5954** to allow a user to create a new folder and/or robot to implement a rule, as described. Exemplary folders include matching exception(s), non-purchase order approvals, remit to validation, and others. The window **5953** includes a selected folder window **5958** that shows a folder currently selected (e.g., "matching exception" in this example) by the user and a save button **5960** allows a user to make changes to that folder. As described, the matching exception rule is invoked when the system fails to find a match between documents, e.g., between a purchase document and an invoice. In some embodiments, a matching exception may check for matches between three or more documents (e.g. between a purchase order, an invoice, and a delivery slip) and if all three fail to match, then report a matching exception. In some embodiments, an auto-matching function can check for matches between three or more documents, and, if all three match, approve a document (e.g., an invoice) for payment.

An add user button **5962** allows an administrator or super-user to add approvers to a folder and/or robot in the selected folder window **5958** above. In some embodiments, the approver user information includes approver name **5964**, user name **5966**, approver email **5968**, and approver phone **5970**. In some embodiments, a remove button **5972** allows an administrator or super-user to remove an approver.

This screen of FIG. **59C** allows a user to assign approvers to shared workflow folders. This assignment allows approvers to distribute the approval workload among themselves, which will lead to overall faster approvals as bottlenecks are likely to be eliminated.

FIG. **59D** shows an exemplary screenshot **5975** of a review required approvals screen. This screen is generated at the eProcurement server **20**, in some embodiments by sales/purchase management module **2046** (FIG. **20**), as described with reference to FIG. **59A**. This screen is displayed to a user wishing to see the status of a document (e.g., an invoice) in the workflow as it is being processed.

FIG. **59D** includes a settlement menu tab **5976**, including an invoice history menu tab **5977**. This invoice history tab includes information such as invoice number, supplier invoice number, supplier name, and also includes a drop down menu **5978** for performing available actions (e.g., perform matching). An approvals menu tab **5980** shows at what stage in the approvals process an invoice is currently active. Approvals stages include invoice submitted **5982**, auto matching performed **5984**, matching exceptions resolved **5986**, and invoice completed **5988**. In some embodiments, more or fewer stages are possible, depending on the number of steps in the folders and/or robots specified.

In some embodiments, the screen of FIG. **59D** allows the user to view the current state of the document within invoice workflow. This screen shows the completed, active and pending steps: In some embodiments, another step shows the assigned approver associated with an invoice. In some embodiments, the screen shows a plurality of tabs representing buyer invoice **5979**, approvals **5980**, matching **5981**, and history **5983**. The buyer invoice tab **5979** represents a buyer invoice to be approved for payment. The approvals tab **5980** represents the approvals and matching process shown in FIG. **59D**. The matching tab **5981** represents matching documents corresponding to the buyer invoice. The history tab **5983** represents a history of events associated with the buyer invoice.

FIG. **59E** shows an exemplary screenshot **5990** of a "review invoices requiring approval screen." This screen is generated at the eProcurement server **20**, in some embodiments by sales/purchase management module **2046** (FIG. **20**), as described with reference to FIG. **59A**. This screen is

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presented to an approver checking the status of invoices assigned to him/her for review/approval.

FIG. 59E includes an approvals menu tab **5991**, including an invoice menu tab **5999**. The invoice menu tab includes a toolbar **5992** to filter invoice approvals provided to the user approver (in some embodiments with sub options to show invoice details and assign substitute approvers), and a drop down menu **5995** to apply actions to selected invoices (e.g., approve/complete invoice). In some embodiments, the filtering includes showing invoices that are approved, or showing invoices that are not approved, or a combination thereof. In some embodiments, the filtering includes showing invoices that are assigned to the user, showing invoices that are assigned to a pool of approvers, showing invoices for which the user is a substitute approver, or a combination thereof.

A window **5993** shows a 'my invoice approvals' personal folder, showing invoice approvals associated with the current user. The invoice approvals may in some embodiments include one or more details such as invoice number, state (e.g., active, inactive, etc.), supplier invoice number, supplier name, invoice date, invoice type, amount of invoice, due date, discount date (date by which if paid, a discount is applied), action (e.g. approve, deny, etc.), and a select box **5996** for indicating that an action (e.g., from drop down menu **5995**) should be performed on the invoice. A matching exceptions window **5994** shows matching exceptions for invoices and the approval state, approver, supplier, invoice and due dates, amount, and discount date associated with each invoice, and a select box indicating that an action (e.g., from drop down menu **5995**) should be performed to the invoice.

The matching exceptions window **5994** may show an invoice (e.g., reference 1-00128) with a status 'assigned' that has been assigned to the user, as shown in the 'My Invoice Approvals' window **5993**. The matching exceptions window **5997** may also show other non-assigned invoices (e.g., those listed below the assigned invoice 1-00128 in window **5994**).

In some embodiments, this window **5994** is a shared approver folder, in which a plurality of approvers **5997** may review invoices and make approval decisions regarding them. This shared approver folder may help reduce bottlenecks in the system if one approver is unavailable or too busy to approve invoices, by sharing the workload among other approvers. Apply action button **5998** chooses an action to apply to a selected invoice.

The "review invoices requiring approval" screen of FIG. 59E allows the approver to view their personal workflow approval list, e.g. the documents currently assigned to them for review. This screen allows the approver to view all shared folders assigned to them as part of the Workflow Setup process. In some embodiments, a user or users have the capabilities to perform from such a screen one or more of: approving or completing invoices, rejecting invoices, placing documents (invoices) on hold, and forwarding invoices to other approvers. In some embodiments, substitute approvers may be assigned to personal and shared folders. In some embodiments, users with advanced management permissions (super users or administrators) may manage folders and documents on behalf of other approvers.

FIG. 60 is a flowchart representing a server method **6000** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **6000** may be governed by instructions that are stored in a computer readable storage medium and that are executed by one or more processors of one or more servers. Each of the operations shown in FIG. 60 may correspond to instructions stored in a computer memory or computer readable storage medium. The computer readable storage medium may include a mag-

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netic or optical disk storage device, solid state storage devices such as flash memory, or other non-volatile memory device or devices. The computer readable instructions stored on the computer readable storage medium are in source code, assembly language code, object code, or other instruction format that is interpreted by one or more processors. In the following flowchart, dashed line boxes indicate optional operations or steps that may be implemented in some embodiments.

In the following descriptions and embodiments, purchase orders may be accessed in purchase orders database (FIG. 22, **2500**), requisitions may be accessed in requisitions database (FIG. 22, **2700**) invoices may be accessed in buyers invoice database (FIG. 22, **3300**) and sales invoice database (FIG. 22, **3400**), and business rules may be accessed in a business rules database, all as described. The databases may be accessed by database and management module (FIG. 20, **2070**) and invoice, purchase order, order and requisition module (FIG. 20, **2082**).

In some embodiments, the server method **6000** includes the following operations, performed at a server hosting an electronic procurement system. The server method includes associating business rules with a plurality of users (**6002**). One or more catalog items are displayed (**6004**) to a respective user in accordance with the respective business rules associated with that user. In some embodiments, approval of a purchase requisition is determined (**6006**) for a displayed catalog item. A purchase order is generated (**6008**), in some embodiments for the purchase requisition, and/or in some embodiments for a displayed item.

In some embodiments, the business rules are specified by a super-user (**6019**). In some embodiments, the business rules are stored at the server (**6020**). In some embodiments, the purchase documents (including purchase requisition and purchase order) are stored at the server (**6021**). In some embodiments, the business rules include a procurement policy and purchasing permissions (**6024**). In some embodiments, the purchasing permissions include purchasing approval ability and purchasing limit ability (**6026**).

In some embodiments, the business rules may be customized according to at least one of a group consisting of by user, by role, and/or by department (**6028**). In some embodiments, approval by a user of his or her own purchase request may be prevented in accordance with the business rules (**6030**). In some embodiments, approval by a user of his or her own purchase request over a spending limit may be prevented in accordance with the business rules (**6032**). In some embodiments, the system determines from which supplier items are ordered in accordance with the procurement policy and contractual agreements (**6034**).

FIG. 61 is a flowchart **6100**, continuing the flowchart of FIG. 60. In some embodiments, the electronic procurement system is a single instance multi-tenant system (**6110**). In some embodiments, the electronic procurement system is a web-based system (**6112**). In some embodiments, the server is located independently from suppliers and purchasers of the electronic procurement system (**6114**). In some embodiments, the server is located at a supplier of the electronic procurement system (**6116**). In some embodiments, the server is located at a purchaser of the electronic procurement system (**6118**). These features of FIG. 61 apply in part or in whole to all systems described here, including systems **6900**, **7000**, **7100** as described.

In some embodiments, displaying catalog items in accordance with business rules comprises preferentially displaying items based on quotas of purchases to be filled (**6120**). In some embodiments, generating a purchase order includes

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associating workflow rules with the purchase order, in accordance with business rules (6122).

FIG. 62 is a flowchart representing a server method 6200 for hosting an eProcurement system, according to certain embodiments of the invention. The server method 6200 may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, server method 6200 includes the following operations. Business rules are associated (6202) with a plurality of catalog items. In some embodiments, the business rules are associated with a supplier. One or more catalog items are displayed (6204) to a respective user in accordance with the respective business rules associated with the respective catalog items. In some embodiments, the display is in accordance with business rules associated with a supplier. In some embodiments, approval is determined (6206) for a purchase requisition for a displayed catalog item. A purchase order is generated (6208), in some embodiments for the purchase requisition and/or in some embodiments for a displayed item.

In some embodiments, purchasing status is displayed for the purchase requisition (6210). In some embodiments, purchasing status is displayed for the purchase order. In some embodiments, displaying includes presenting on a graphical dashboard approval, purchasing, and fulfillment status for the item (6212).

In some embodiments, the graphical dashboard is dynamically generated at the server in accordance with business rules stored at the server (6214). In some embodiments, purchasing status is displayed for a shopping cart associated with the purchase requisition (6216). In some embodiments, purchasing status is displayed for a purchase order associated with the purchase requisition (6218).

FIG. 63 is a flowchart representing a server method 6300 for hosting an eProcurement system, according to certain embodiments of the invention. The server method 6300 may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, server method 6300 includes the following, performed at a server hosting an electronic procurement system. A second available catalog item is identified (6302) corresponding to a first catalog item, in response to a user request to access the first catalog item associated with the electronic procurement system, wherein the first catalog item is unavailable. The second available catalog item is displayed (6304) to the user in accordance with business rules associated with the user. In some embodiments, approval of a purchase requisition is determined (6306) for the displayed catalog item. A purchase order is generated (6308), in some embodiments for the purchase requisition, and/or in some embodiments for a displayed item.

In some embodiments, the business rules associated with the user are determined by a super user (6310). In some embodiments, the super user is at an organization associated with the user. In some embodiments, the business rules associated with the user are stored at the server hosting the electronic procurement system (6312).

In some embodiments, the electronic procurement system includes a plurality of suppliers, at least one of the suppliers having a catalog (6314). In some embodiments, the electronic procurement system includes a plurality of purchasing organizations, each having at least one user, with permissions associated with the at least one user (6316). In some embodiments, the permissions are determined in accordance with business rules (6318). In some embodiments, the permissions are determined by a super user (6320). In some embodiments, the permissions associated with the at least one user deter-

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mine the user's ability to purchase from the catalogs associated with the plurality of suppliers (6322).

FIG. 64 is a flowchart representing a server method 6400 for hosting an eProcurement system, according to certain embodiments of the invention. The server method 6400 may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, server method 6400 includes the following operations. A first user purchase request to purchase an item and a second user purchase request to purchase the same item are received (6402). A determination is made (6404) if there is sufficient stock of the item available to fulfill both user purchase requests. User purchase requests are prioritized (6406) if there is insufficient stock of the item available to fulfill both purchase requests. A purchase order is generated (6408) for at least one of the user purchase requests in accordance with the prioritizing.

In some embodiments, the electronic procurement system is a single instance multi-tenant system (6418). In some embodiments, the server system includes a plurality of purchasing organizations, each purchasing organization having a plurality of associated users. In some embodiments, prioritizing the user purchase requests is performed in accordance with business rules (6410). In some embodiments, prioritizing the user purchase requests is performed in accordance with positions of the users on a management hierarchy (6412). In some embodiments, prioritizing the user purchase requests is performed in accordance with the importance of a respective project associated with a user (6414).

In some embodiments, user purchase requests of a similar priority level are fulfilled according to a first in, first out (FIFO) method (6420). In some embodiments both user purchase requests are placed in a queue according to the prioritizing (6422). In some embodiments user purchase requests of a similar priority level in the queue are fulfilled according to a first in, first out (FIFO) method (6424). In some embodiments, a FIFO method is used for filling purchase orders in queue, but a user's order of insertion in the queue is determined by prioritizing.

In some embodiments, one or more users having an order in the queue are notified when the ordered item is ready for fulfillment (6426). In some embodiments, an alternative available item is presented to a user having an order in the queue, in accordance with a predicted fulfillment delay (6428). In some embodiments, if a user has placed an order, and the order is delayed or expected to be delayed, an alternative item is presented to the user for selection.

In some embodiments, prioritizing is performed according to fees associated with the respective users (6416).

FIG. 65 is a flowchart representing a server method 6500 for hosting an eProcurement system, according to certain embodiments of the invention. The server method 6500 may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, the server method 6500 includes the following, performed at a server hosting an electronic procurement system. A first user purchase request to purchase an item associated with the electronic procurement system and a second user purchase request to purchase the same item are received (6502). A determination is made (6504) upon delivery of the item whether there is sufficient stock of the item available to fulfill both user purchase requests. The user purchase requests are prioritized (6506) based on the determining. The prioritized user purchase requests are fulfilled (6508) in accordance with priority. In some embodiments, prioritizing includes determining which request is the most important or highest priority.

In some embodiments, if, at time of delivery, an alternative item comparable with the requested item is available, and the requested item is not available in sufficient stock to satisfy both the first user and second user, one or more of the user purchase requests are fulfilled with the alternative item **6510**.

FIG. **66** is a flowchart representing a server method **6600** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **6600** may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, the server method **6600** includes the following, performed at a server hosting an electronic procurement system. A series of user purchases of an item is analyzed (**6602**). A property per item purchased in the series is determined (**6604**). An inventory of the item is managed based on the property per item (**6606**).

In some embodiments, the property per item is a cost per unit of item purchased (**6610**). In some embodiments, the cost per item includes the holding cost per unit of that item (**6612**). In some embodiments, the holding cost includes depreciation. In some embodiments, the holding cost includes interest expense.

In some embodiments, managing includes determining a selling price per unit of the item, based on the cost per unit of the item and a markup (**6614**). In some embodiments, the property per item is a spoilage status, based upon average holding time per item (**6616**). In some embodiments, the spoilage status is a 'best before' date for food, medicines, or other organic items. In some embodiments, the property per item is velocity of purchases for that item (**6618**). In some embodiments, the property per item is a predicted out-of-stock time based upon the velocity of purchases and a velocity of sales (**6620**).

FIG. **67** is a flowchart representing a server method **6700** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **6700** may be governed by instructions that are stored in a computer readable storage medium, as described.

In some embodiments, the server method **6700** includes the following, performed at server hosting an electronic procurement system. In response to receiving an invoice (e.g., stored in sales invoice database **3400**, or buyer invoice database **3300**, FIG. **22**), a purchase document (e.g., from purchase order database **2500** or purchase request database **2700**, FIG. **22**) corresponding to the invoice is identified (**6702**), for example by sales/purchasing management module **2046**, FIG. **20**. Contents of the purchase document are compared (e.g., auto-matching **5984**, and perform matching action **5978**, FIG. **59D**) against contents of the invoice (**6704**). A discrepancy (e.g., matching exception **5986**, FIG. **59D**) between the purchase document and the invoice is identified (**6706**). A notification is generated based upon the identified discrepancy (**6708**). In some embodiments, the invoice is provided by a supplier to the electronic procurement system. In some embodiments, the purchase document is a purchase order or a purchase requisition.

In some embodiments, the comparing is performed by comparing fields of the buyer invoice database **3300** and/or seller invoice database **3400** with corresponding fields from the purchase order database **2500**, all in FIG. **22**. In some embodiments, these fields include one or more of Purchase Order Workflow Activity History **2510**, Supplier **2532**, Purchase Order Line Product **2548**, and/or Purchase Order User Selected Approver **2562**, all in FIG. **25**. The selected fields are exemplary, and in other embodiments a different selection of fields could be compared.

In some embodiments, comparing contents includes performing at least a two way match (e.g., auto-match **5984**, FIG. **59D**) between the invoice and the purchase document (**6170**). In some embodiments, at least a two way match includes a two way match and a three way match. In some embodiments, generating a notification includes notifying a user (e.g., matching exceptions **5994**) associated with the purchase of the match (**6722**). In some embodiments, approval is requested from the user that the match is correct (**6724**). In some embodiments, approval is requested from the user to pay the invoice (**6726**), e.g., approve box **5996**, FIG. **59E**. In some embodiments, identifying a discrepancy includes determining if a property associated with the invoice is outside of a tolerance range (**6712**). In some embodiments, the tolerance range is specified by business rules (**6714**). In some embodiments, the property includes at least one selected from a group consisting of price, quantity, delivery date, and/or delivery quality (**6716**).

In some embodiments, generating a notification includes notifying the supplier that the invoice is in dispute (**6728**). In some embodiments, the supplier and a purchaser associated with the invoice are provided with access to an online dispute resolution mechanism (**6732**). In some embodiments, the online dispute resolution mechanism is hosted within the electronic procurement system (**6734**).

In some embodiments, a receipt (e.g., from receipt database **2800**) is generated for payment towards the invoice if the value of the invoice is over a threshold (**6736**).

In some embodiments, identifying a discrepancy includes determining if an alternative item comparable with the requested item has been delivered (**6718**). In some embodiments, a determination is made whether the purchase order has been satisfied by the alternative item (**6720**). In some embodiments, comparing contents includes performing at least a three way match between the invoice and a purchase order and a purchase requisition (**6738**).

FIG. **68** is a flowchart representing a server method **6800** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **6800** may be governed by instructions that are stored in a computer readable storage medium, as described. In some embodiments, server method **6800** includes the following, performed at server hosting an electronic procurement system. In response to receiving an invoice, a purchase document corresponding to the invoice is identified (**6802**). The invoice and the purchase document are linked (**6804**). The invoice and the purchase document are presented (e.g. **5995**, FIG. **59E**) for payment approval (**6806**).

In some embodiments, the identifying operation (**6802**) is performed by comparing fields of the buyer invoice database **3300** and/or seller invoice database **3400** with corresponding fields from the purchase order database **2500** and/or purchase requisition database **2700**, as described in FIG. **22**.

In some embodiments, the linking and presenting for approval is performed by associating the buyer invoice database **3300** and/or seller invoice database **3400** with the purchase order database **2500** and/or purchase requisition database **2700**. When the invoice is presented for approval, the associated purchase document is retrieved from the respective purchase database (**2500** or **2700**) and presented to the approver. This permits the approver to perform an 'eyeball' compare, i.e. human review, to ensure everything is correct prior to payment. This avoids the need for the approver to manually search for the purchase document and manually retrieve it (which may be time consuming) prior to approval.

FIG. **69** is a block diagram of a server system **6900**, including an eProcurement provider **20** hosted at server **3720**. The



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server **3720** is coupled, either locally or remotely, to a database/storage **3760** that hosts a plurality of databases, as previously described.

The electronic procurement (eProcurement) provider **20** interacts over a network **16** with a plurality of purchaser clients **212**, both as described earlier. The purchaser clients run client application **1532**. The eProcurement provider **20** also interacts over network **16** with a plurality of supplier clients **214**, wherein at least one of the suppliers has an associated catalog, as described earlier. The supplier clients run client application **1516**. The supplier and client applications may include a web-browser interface or a stand alone application for accessing the eProcurement provider **20** and server **3720**. The server **3720** may provide a web interface **3750** as described earlier. The server **3720** hosts a plurality of databases, as described earlier. The electronic procurement provider **20** hosts one or more supplier and purchaser workflow and material management **6902** applications, as described earlier. These applications assist users **212** and suppliers **214** in making transactions using eProcurement provider **20**, over the web interface.

In some embodiments, the electronic procurement system **20** is a single instance multi-tenant system. In some embodiments, the electronic procurement system **20** is a web-based system, using web interface **3750**. In some embodiments, the server **3720** is located independently from suppliers **214** and purchasers **212** of the electronic procurement system.

FIG. **70** shows an eProcurement system **7000** hosted at a supplier server **7010**, which interacts over a network **16** with a plurality of purchaser clients **212**, both as described earlier. In this embodiment, the server **7030** is located at a supplier **7010** of the electronic procurement system. The purchaser clients run client applications **1532**. This application may include a web-browser interface or a stand alone application, for accessing the supplier electronic procurement service **7020** and server **7030**. The server **7030** may provide a web interface **7050** as described earlier. The supplier server **7010** hosts a plurality of databases, as described earlier. The supplier electronic procurement service **7020** hosts one or more supplier workflow and material management **7010** applications, as described earlier.

FIG. **71** shows an eProcurement system **7100** hosted at a purchaser server **7110**, which interacts over a network **16** with a plurality of supplier clients **214**, wherein at least one of the suppliers has an associated catalog, as described earlier. In this embodiment, the server **7130** is located at a purchaser **7110** of the electronic procurement system. The supplier clients run client application **1516**. This application may include a web-browser interface or a stand alone application, for accessing the purchaser electronic procurement service **7120** and server **7130**. The server **7130** may provide a web interface **7150** as described earlier. The purchaser server **7110** hosts a plurality of databases, as described earlier. The purchaser electronic procurement service **7120** hosts one or more supplier workflow and material management **7140** applications, as described earlier.

FIG. **72** is a flowchart representing a server method **7200** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **7200** may be governed by instructions that are stored in a computer readable storage medium, as described. In some embodiments, server method **7200** includes the following, performed at server hosting an electronic procurement system.

One or more instructions for managing an invoice workflow are received (e.g. FIG. **59A** workflow folder import browse button **5912**, load folders/robots button **5914**) (**7202**), wherein the instructions have one or more steps having one or

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more rules (FIG. **59B**, rules **5942 A-C**), the rules determining when a respective step is executed.

User commands are received **7204** to modify (FIG. **59B**, steps **5931**, activities **5940**) instructions to generate a custom workflow having a plurality of steps (FIG. **59B**, steps start **5943**, stop **5944**), with one or more rules (associated with the plurality of steps).

The custom workflow is activated **7206** (in accordance with business rules), such that the custom workflow is executed when an invoice is processed by the electronic procurement system (e.g., FIG. **59E** matching exception **5994** corresponds to a rule for matching exception **5943C** in FIG. **59B**).

In some embodiments, modifying instructions (i.e., commands or steps to modify instructions) includes generating **7208** a rule for distributing an approval workload to a plurality of approvers, wherein an approval task assigned to a shared workflow folder (FIG. **59E**, folder **5994**) can be reviewed by any of a plurality of approvers. In some embodiments, distributing includes assigning a plurality of approvers to the shared workflow folder (**7210**).

In some embodiments, modifying instructions includes generating **7212** a rule (e.g., FIG. **59B**, rule **5943A**) for processing an invoice not associated with a purchase order. In some embodiments, modifying instructions includes generating **7214** a rule (e.g., FIG. **59B**, rule **5943B**) for automatically matching an invoice to a purchase document. In some embodiments, modifying instructions includes generating **7214** a rule (e.g., FIG. **59C**, rule **5943B**) for processing matching exceptions between an invoice to a purchase document. In some embodiments, modifying instructions includes generating **7214** a rule (e.g., FIG. **59D**, rule **5943B**) for automatically approving an invoice for payment. In some embodiments, modifying instructions includes generating **7216** a rule for removing (e.g., FIG. **59C**, remove user **5972** and add user **5962**) a user or an administrator from an invoice approval workflow.

In some embodiments, modifying instructions includes generating **7218** a rule for displaying to an approver (e.g., FIG. **59C** approvers **5966**) an invoice requiring approval. In some embodiments, the invoice is selected (**7220**) from a group consisting of a personal review folder and a shared invoice folder. In some embodiments, the one or more rules are defined (**7222**) by logical expressions (e.g., steps **5931**, and rules **5943 A-D**).

In some embodiments, the generated custom workflow is exported (**7224**) to a file (e.g., FIG. **59B**, export **5926**). This file may be an XML file, a file containing a markup language, a binary file, a text file, or a file with any other format for storing data.

FIG. **73** is a flowchart representing a server method **7300** for hosting an eProcurement system, according to certain embodiments of the invention. The server method **7300** may be governed by instructions that are stored in a computer readable storage medium, as described. In some embodiments, server method **7300** includes the following, performed at server hosting an electronic procurement system.

One or more instructions are received (**7302**) for managing an invoice workflow. At least part of the received instructions are activated (e.g., FIG. **59A**, workflow imported instruction folder/robot **5914**) (**7304**) such that the at least part of the activated instructions are executed (e.g., FIG. **59C** invoice workflow approvals **5991**, **5993**, **5994**) when an invoice is processed by the electronic procurement system, wherein the activating is performed in accordance with business rules.

In some embodiments, a rule is generated (**7306**) for distributing (e.g., FIG. **59C** approvers **5964** and users **5968**) an



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approval workload to a plurality of approvers. In some embodiments, the distributing includes assigning (7308) a task to a shared workflow folder to be executed by any of the plurality of approvers.

FIG. 74 is a flowchart representing a server method 7400 for hosting an eProcurement system, according to certain embodiments of the invention. The server method 7400 may be governed by instructions that are stored in a computer readable storage medium, as described. In some embodiments, server method 7400 includes the following, performed at server hosting an electronic procurement system.

A list of invoices requiring approval are sent (e.g., FIG. 59E, invoice approvals 5992) (7402) to a user of a system, wherein the list of invoices comprises one or more invoices assigned to a shared invoice folder sent (e.g., FIG. 59E, window 5994 with shared approvers 5997) (5992) for which the user is an approver. In some embodiments, the list of invoices further comprises invoices assigned to a personal review folder (e.g., FIG. 59E my invoice approvals 5993) associated with the user (7404).

A command is received (7408) from the user to process (e.g., FIG. 59E action 5995, select 5996) one or more items selected from the list of invoices. In some embodiments, the command from the user comprises (7408) one selected from the group consisting of approve an invoice, complete an invoice, reject an invoice, place an invoice on hold, and forward an invoice to another approver. In some embodiments, the command from the user includes assigning (7410) a substitute approver (e.g., FIG. 59E assign 5998 approver) for a personal review folder associated with the user. In some embodiments, the command from the user includes assigning (7412) a substitute approver for the shared invoice folder.

In some embodiments, an item associated with one or more users is processed (7414) in response to a selection by a super user. In some embodiments, the processing comprises (7416) one selected from the group consisting of approve an invoice, complete an invoice, reject an invoice, place an invoice on hold, and forward an invoice to another approver.

In some embodiments, a task is assigned (7418) to a shared workflow folder for review by any of a plurality of approvers, including the user. In some embodiments, an approval status report is sent (7420) to the user, showing at least one selected from the group consisting of submission, approval, active and completed status (FIG. 59D, 5982, 5984, 5986, 5988 respectively).

FIG. 75 includes a listing of folder and robots, including a Remit To Validation folder 7502, a Non-PO Approvals folder 7504, a Matching Exceptions folder 7506, a Matching Exception folder 7508, and Over Credits folder 7510, an Auto-Matching folder 7512, an OK to Pay folder 7514, and Over Credit-Auto Reject folder 7516, an Auto Match robot 7518, an Okay to Pay robot 7520, and an Over Credit/Invoice Process robot 1800.

In some embodiments, the Remit To Validation folder 7502 confirms that a supplier address to which funds are remitted is a valid supplier address. In some embodiments, the supplier address associated with an invoice is checked against a database of known supplier address (in some embodiments, controlled by a buyer administrator). Only if the address associated with the invoice matches with a known good supplier address are funds remitted. This may prevent mistaken payments to incorrect suppliers. This may also prevent unauthorized remittances of funds to unapproved suppliers, and thus help prevent fraud or misuse of the electronic procurement system.

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In some embodiments, the Non-PO Approvals folder 7504 implements a non-purchase order approval process, as described.

In some embodiments, the Matching Exceptions folder 7506 and Matching Exception folder 7508 implement a matching exception(s) process, as described.

In some embodiments, the Over Credits folder 7510 implements a process to prevent a supplier from over-crediting a returned item or items from a buyer. For example, a buyer may purchase ten units of a product, then return the ten units to the supplier. If the supplier credits the buyer for twelve units returned, then the supplier has over-credited the buyer by two units. The over credits folder 7510 identifies such a situation and flags it to an approver, in one embodiment by comparing the number of returned items from a buyer against the number of credited items from the supplier.

In some embodiments, the Auto-Matching folder 7512 implements an automatic matching process (e.g., between invoices and purchase documents), as described.

In some embodiments, the OK to Pay folder 7514, implements an approval system for processing payment of invoices.

In some embodiments, the Over Credits Auto Reject folder 7516 implements a process to prevent a supplier from over-crediting a returned item or items from a buyer, and for automatically rejecting any invoices having over credits.

In some embodiments, the Auto Match robot 7518, Okay to Pay robot 7520, and Over Credit/Invoice Process robot 1800 operate as described, either alone or in conjunction with the respective folder.

FIG. 80 illustrates an exemplary field management interface in accordance with the present invention, as described. A Language Selection is illustrated, including a 'select a language' option for selecting a language for use in the electronic procurement system. A Field Management selection is illustrated, allowing a user to select fields from a field selection menu, showing a field history, and showing options for creating a new sibling or a new child. A 'save option' and an 'apply all changes' option is shown also.

FIG. 81 illustrates an exemplary update favorite(s) process flow in accordance with the present invention, as described. An option is provided for a user to select a favorite description, which may be applied to a product, and which may be placed in a favorites menu.

FIG. 82 illustrates an exemplary document setup interface in accordance with the present invention, as described. An option to add internal attachments is shown. An option to add attachments for all suppliers is shown.

FIG. 83 illustrates shows a system 10300 hosted at a supplier server 10310, which interacts over a network 16 with a plurality of purchaser clients 212, both as described earlier. The purchaser clients run client applications 1532. This application may include a web-browser interface or a stand alone application, for accessing the supplier electronic procurement service 10320 and server 10330. The server 10330 may provide a web interface 10350 as describe earlier. The electronic procurement provider 10320 hosts a plurality of databases 10360, including databases 2200 as described earlier.

FIG. 84 illustrates shows a system 10400 hosted at a purchaser server 10410, which interacts over a network 16 with a plurality of supplier clients 214, both as described earlier. The supplier clients run client applications 1516. This application may include a web-browser interface or a stand alone application, for accessing the purchaser electronic procurement service 10420 and server 10430. The server 10430 may provide a web interface 10450 as describe earlier. The elec-

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tronic procurement provider **10420** hosts a plurality of databases **10460**, including databases **2200** as described earlier.

In some embodiments, the electronic procurement system **20** is a single instance multi-tenant system. In some embodiments the electronic procurement system **20** is a web-based system.

In some embodiments the electronic procurement system **20** is located independently from suppliers and purchasers of the electronic procurement system. In some embodiments the electronic procurement system **20** is located at a supplier of the electronic procurement system. In some embodiments the electronic procurement system **20** is located at a purchaser of the electronic procurement system.

FIG. **76A** illustrates a flowchart **7600** representing a server method for hosting an eProcurement system and for importing a purchase requisition, according to some embodiments.

A purchase requisition is received **7602** (e.g., from a user determined by user management module **2074**, FIG. **20**), where the purchase requisition originates from a purchasing organization outside of the electronic procurement system. In some embodiments, the purchase requisition is received by requisition module **2082** (FIG. **20**). An exemplary electronic procurement system is the “Higher Markets” module in the “Select Site” product by SciQuest, Inc.

In some embodiments, the “Higher Markets” module allows a user to search hosted catalogs and compare product features, descriptions, pictures, technical data and pricing, or “punch-out” to suppliers’ web sites customized with the user’s pricing and catalog specifications. The “Higher Markets” module allows a user to point and click to build shopping carts, attach notes and comments to requisitions and conduct all purchase requests electronically, using one system, and to track approval status of requisitions via electronic workflow. The “Higher Markets” module allows a user to acknowledge receipt of goods, reject damaged orders or accept partial shipments through the Express interface, and to view order history, favorites and organizational notices.

Examples of the purchasing organization include academic, laboratory, industrial, commercial, government, or military procurement systems, running on open or proprietary platforms. Examples of these platforms include FAMIS, Maximo, IonWave, Squared, Oracle, and SAP.

In some embodiments, the purchasing organization may use a different format (including for data values, formats, attributes, and properties) to the electronic procurement system (e.g., in requisition database **2700**, FIG. **22**), depending on the purchasing organization’s system, software, internal procedures, etc.

In some embodiments, a user associated with the purchase requisition is prevented from editing the purchase requisition (**7604**). In some embodiments, the purchaser-specified required information may be stored in an end user database **232** and/or a requisition database **2700** (FIG. **22**). This would be desirable when the purchasing organization wants to ensure that all requisitioned items are visible and are tracked through its own system. This prevents a user from submitting a purchase requisition within the purchasing organization’s system and then editing it outside the purchasing organization’s system to add other items, which are not tracked by the purchasing organization’s system.

In some embodiments, the system verifies (**7606**) that required information is present, and if not, saves the purchase requisition in the electronic procurement system and notifies a user associated with the purchaser requisition that the required information is missing. Examples of such required information could include shipping information, billing information, and payment information. In an example, if a

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known user submits a purchase requisition, but omits the shipping information, billing information, or payment information, the purchase requisition may be saved on in the electronic procurement system as a draft, and the user notified by email, etc. to correct the draft purchase requisition.

In some embodiments, the required information is specified (**7608**) by a purchasing organization associated with the purchase requisition. Examples of this required information could include accounting codes, department codes, project codes, contract codes, etc. The purchasing organization may require that requisitions identify (using one of the above codes) what cost center they are associated with, for cost tracking and budgeting purposes. In some embodiments, the system verifies (**7612**) that purchaser required information is associated with the purchase requisition, and if not, notifies a sender (e.g., by email or by a response sent back to a server associated with the purchasing organization, such as an XML message, sent via network communication module **2012**, FIG. **20**) of the purchase requisition that the purchase requisition is refused or is incomplete.

In some embodiments, the required information is a next approver (**7610**) associated with the user submitting the purchaser requisition. In some embodiments, a user of the procurement system has an associated next approver (e.g., stored in end user database **232** and/or user security database **3500**, FIG. **20**), where the associated next approver typically approves the user’s purchaser requisitions or approves purchase requisitions over a certain amount. As an example, a technician may have approval ability for one hundred dollars worth of lab supplies. If the technician submits a purchase requisition for an item that costs over one hundred dollars, the technician’s next approver (e.g., a lab manager supervising the technician) may need to approve the purchase requisition. In some embodiments, approvers may be substituted or assigned. In some embodiments, users and approvers are identified by a user identifier (e.g., employee number, account number) associated with them or with their account. In some embodiments, users and approvers are identified by a role or a position (e.g., lab manager, department head, vice president) associated with them or with their account.

In some embodiments, the system verifies (**7614**) (e.g., performed by requisition module **2082**, FIG. **20**) that at least one line item is associated with the purchase requisition, and if not, notifies a sender of the purchase requisition that the purchase requisition is refused. In some embodiments, if a blank (e.g., no items ordered) purchase requisition is received, then the requisition may be either refused, or may be saved as a draft (e.g., in requisition database **2700**) and a notification sent to the user/requestor and/or purchasing organization that the requisition is blank and needs to be completed with at least one item to be ordered.

In some embodiments, a plurality of purchase requisitions are received in a single operation (**7616**), including in a file, a batch of files, or a set of requisitions received substantially together. An example of this is where a purchase organization might aggregate all of its purchases over a day or a week or other time period to minimize shipping costs, and submit them together or spread over a particular time period.

FIG. **76 B** continues the flowchart **7600** of FIG. **76A**. The purchase requisition is converted (**7630**) from a first format to a second format, wherein the second format is native to the electronic procurement system. In some embodiments, the conversion process (e.g., performed by schema translate module **2026** or schema update module **2028**, FIG. **20**) involves reading the received purchase requisition, identifying fields and/or data (including attributes and/or properties) in the purchase requisition corresponding to fields and/or data

of the electronic procurement system, and mapping the data from the respective fields of the received purchase requisition to the respective fields of the electronic procurement system, e.g., in requisition database **2700**. In some embodiments, the received purchase requisition is in XML format, or in another markup language.

In some embodiments, an attachment associated with the purchase requisition is imported into the electronic procurement system (**7634**). Examples of an attachment may be a product specification, images associated with an item, supporting information for a competitive bid, or other information that is related to the product requisition.

In some embodiments, the second format native to the electronic procurement system is Extensible Markup Language, also known as XML (**7636**). XML is a general-purpose specification for creating custom markup languages. It is classified as an extensible language because it allows its users to define their own elements. An application of XML is to help information systems share structured data, particularly via the Internet, and it is used both to encode documents and to serialize data. Other related languages, syntaxes, and formats could also be used to achieve the same purpose.

In some embodiments, a respective restricted item is identified in the purchase requisition and a respective restriction is applied to the purchase requisition, in accordance with business rules (**7638**). Examples of a restricted item include radioactive items, select agents, poisons, asbestos, and other hazardous materials. For these items and others requiring special handling or processing, the purchasing workflow (e.g., controlled by workflow module **2076**, and stored in workflow database **3000**, FIG. **20**) may associate special labels, flags or warnings with the purchase request and any associated purchase order, invoice, shipping/receiving documentation, etc. In some embodiments, a restriction override request for a respective restricted item is identified in the purchase requisition (**7640**). Such a restriction override request may be appropriate where the ordering facility is equipped to receive hazardous material, e.g., at an industrial recycling or disposal facility or where no special handling or processing is required above normal procedures.

In some embodiments, a form (e.g., controlled by forms module **2076**, FIG. **20**) associated with the purchase requisition is identified, data is mapped from the purchase requisition into the form, and the mapped form data is stored (e.g., in forms database **2300**, FIG. **20**) at the electronic procurement system (**7642**). An example of such a form is an order form for business cards, a menu for a restaurant, any order for which a standard set of options may be chosen, etc. In this scenario, a user submits a purchase request for an item, where the item is associated with a form. The purchase request item is mapped into a form, and the form is routed to a supplier (e.g. through sale fulfillment module **2054**, FIG. **20**). In some embodiments, items listed in the form are mapped to items in the hosted catalog (e.g., by catalog module **2020**, FIG. **20**), prior to being routed to the supplier.

In some embodiments, a punchout item (in some embodiments, displayed to the user through a punchout module **2126**, FIG. **21**) associated with the purchase requisition is identified. A punchout item is an item associated with a catalog hosted by a supplier, for example at the supplier's website. An exemplary punchout item is a laptop computer that a user configures at a PC vendor's website, for which the user receives from the PC vendor an identifier associated with the configured laptop. The user then submits a purchase request for the laptop computer using the identifier associated with the configured laptop. The purchase request is processed (e.g., requisition module **2082**) using the identifier informa-

tion, and, after routing for approval, a corresponding purchaser order is sent to the supplier, e.g., by purchase order module **2082**, and the purchase order is stored in purchase order database **2500** (FIG. **20**).

In some embodiments, the purchase requisition is identified as an imported requisition (**7644**). In some embodiments, the imported purchase requisition is routed to an approval process (e.g., via workflow module **2076**, FIG. **20**) for imported requisitions (**7646**). In an exemplary scenario, imported requisitions may be routed and processed separately from requisitions originating from (i.e., starting within) the electronic procurement system. Imported requisitions may have different approval requirements and reporting requirements to normal (originating from the electronic procurement system) requisitions.

In some embodiments, a requisition identifier associated with an imported requisition is identified and stored, wherein the electronic procurement system supports searching (e.g., using database access module **2072**, FIG. **20**) by the requisition identifier (**7648**). This is desirable because the purchasing organization or a user can search for or track the purchase requisition using this requisition identifier.

The server verifies (**7650**) that the converted purchase requisition is consistent with business rules (e.g., from business rules database **3756**, FIG. **37**) associated with the electronic procurement system, including at least a rule to verify that the purchase requisition originates from a recognized user of the electronic procurement system. This verification includes checking (e.g., performed by requisition module **2082**, in some embodiments including schema translate module **2026** and/or scheme update module **2028**, FIG. **20**) that the converted purchase requisition does not violate any business rules (e.g., rules set by the purchasing organization or rules set by the electronic procurement system), for example, that the user has permission to order items in the requisition.

FIG. **76 C** continues the flowchart **7600** of FIG. **76B**. In some embodiments, prior to routing, edits by a user to the purchase requisition are received at the electronic procurement system, and the purchase requisition is updated (e.g., update purchaser requisition database **2700**, FIG. **22**) with the edits (**7660**). In some embodiments, the electronic procurement system verifies that the updated purchase requisition is consistent with the business rules (**7662**).

In some embodiments, prior to routing for approval, a plurality of bids for the verified purchase requisition are received, a user selected bid from the plurality of bids is received, and the purchase requisition is updated with the user selected bid. This is useful in a situation where a purchasing organization or user has a large volume of items to purchase and puts the items up for competitive bid. In some embodiments, upon receiving a plurality of bids, the purchasing organization or user may select one of the bids and the purchase requisition is updated accordingly. In some embodiments, the bid may be selected automatically based on some criteria such as price, delivery date, etc. The purchase requisition is routed for approval (**7666**), e.g., through workflow module **2076** (FIG. **20**).

In some embodiments, routing for approval means that the purchase requisitions is transmitted, forwarded, or sent to one or more approvers to approve the purchase requisition. In some embodiments, routing for approval means that the purchase requisition is transmitted, forwarded, or sent to an approval system for automatic approval (i.e., without requiring a human approver). In some embodiments, the system for automatic approval is based on an algorithm for approving purchases.

In some embodiments, a re-order based on the purchase requisition is prevented (7668), based on business rules. This is to ensure that a separate purchase requisition must be submitted for each order so that the purchasing organization can track each purchase individually.

FIG. 77 illustrates an exemplary screenshot 7700 of an imported purchase requisition user interface, according to some embodiments. The purchase requisition may include fulfillment information such as a shipping group 7710, a billing group 7712, and delivery details 7714, including attachments and notes for suppliers and purchase order clauses. The purchase requisition may include order information such as a cart group 7716 including name, description, cart source, priority, expedite, submitted, budget, and approval details. The purchase requisition may include approval details 7718 including prepared-by information and status. The purchase requisition may include account details 7720, including a splitable custom field group 7720, accounting information 7722, including department code and project code, internal attachments 7724, and other account information. In some embodiments, the fields described in the screenshots of FIG. 77 and FIG. 78 have corresponding fields or entries in the purchase requisition database 2700 (FIG. 22).

The purchase requisition may include supplier and line item details 7726. These details may include the supplier, a PO number, a contract number, an account code, a quote number, a pricing code, purchase order clauses, and other related fields. A line item 7728 may include product description details, catalog number 7730, size and packaging details, and cost details 7732, including unit price, quantity, and total price.

FIG. 78 illustrates an exemplary screenshot of an imported purchase requisition, highlighting required fields, according to some embodiments. The purchase requisition may include a shipping group 7810, in some embodiments used by purchasing/checkout module 2148, and/or an order fulfillment module 2150 (FIG. 21). A billing group 7812 (e.g., used by payment module 2152, FIG. 21) is shown highlighted as a required field, which, if missing, means that the purchase requisition is incomplete. This will cause a rejection of the purchase requisition, or an acceptance but with a notification sent to the owner of the requisition to add the required information before the requisition can be processed. The purchase requisition may include credit card information 7814, which in some embodiments is a required field also. In some embodiments, the credit card information is stored in user/security database 3500 (FIG. 22).

The purchase requisition may include a cart group 7816 (e.g., used by cart management module 2144, FIG. 21), approval details 7818, splitable custom field group 7820, accounting information 7822, internal attachments 7824, product descriptions 7828, catalog number 7830 (in some embodiments, used by catalog module 2020, FIG. 20), and price and quantity 7832, as described.

A splitable custom field group includes a grouping of account codes that allow the user to assign different account codes to an order. This allows for an item to be paid from multiple internal grants or funds, e.g., from research grants in an academic environment. For example, if a microscope is being purchased and will be used for two projects (or any number of projects), the cost of the microscope can be split among the projects (e.g. 20% for the first project, 80% for the second project, etc.)

FIG. 79 illustrates a flowchart representing a server method for importing a purchase requisition and reporting a status, according to some embodiments. An external procurement system 7902 sends a purchase request 7904 to the electronic procurement system (shown as requisition manager, 7908). In some embodiments, the external procurement system 7902 is associated with a buyer, and may be a proprietary system, as described.

The requisition manager 7908 reads and parses (7910) (in some embodiments, using schema translate module 2026, FIG. 20) the purchaser request 7904 to determine the contents of such request. In some embodiments, the purchaser request is in XML format, which provides information on the identity of data fields in the request. The requisition manager checks (7912) if the purchaser request 7904 contains valid information relating to the electronic procurement system, e.g., if the purchase request is a validly formatted request or if it is unrelated to the electronic procurement system, such as a misdirected or corrupted message.

If the purchaser request 7904 does not contain valid information, then an error response 7906 is sent to the external procurement system 7902.

If the purchaser request 7904 does contain valid information, then the requisition manager 7908 checks if the purchase request contains valid customer defined information 7914, e.g., information that the buyer's (purchasing organization) system (7902) requires to be present in a purchaser requisition. Examples of this customer defined information include department information for a university or contract and/or project information for a commercial purchaser. In some embodiments, if the customer defined information is not associated (NO branch) with the purchaser request, then a draft request 7916 is generated and a notification 7920 is sent to the end user/owner associated with purchase request. Upon receiving corrections or updates 7918 to the requisition from the user, the requisition is ready to be submitted to workflow approval 7924. In some embodiments, if the customer defined information is associated (YES branch) with the purchaser request, then a pending requisition 7922 is generated. The pending requisition is ready to be submitted to workflow approval 7924.

Table 1 lists exemplary purchase requisition information and messages associated with importation of a purchase requisition.

TABLE 1

XML DATA STRUCTURE AND FIELDS ASSOCIATED WITH A PURCHASE REQUISITION.	
Purchase Requisition Message	
Header	Header to the purchase requisition message.
MessageId	Identifier for the purchase requisition message.
Timestamp	Timestamp for the purchase requisition message.
Authentication	Information to authenticate the purchase requisition message.
Identity:	Identity of the external eProcurement system
SharedSecret	Password for the external eProcurement system
Purchase Requisition Requisition Header	Identifier of the requisition in the external eProcurement system

TABLE 1-continued

XML DATA STRUCTURE AND FIELDS ASSOCIATED WITH A PURCHASE REQUISITION.	
RequisitionNumber	Name of the requisition in the external eProcurement system
RequisitionName	Description of the requisition in the external eProcurement system
Description	Owner of the requisition (user must exist in the SciQuest application)
Requestor	
username (attribute)	Unique identifier for the owner of the requisition
Prepared By	User which created the requisition in the external eProcurement system (user must exist in the SciQuest application)
UserProfile	
username (attribute)	Unique identifier for the user who created the requisition
PriorityFlag	PriorityFlag to determine if the requisition is a priority
BillTo	Bill to address for the requisition. Applies to all requisition lines unless a specific line has a unique bill to address
Address	
TemplateName	Identifier that will link the bill to address to the layout as defined within the SciQuest application
AddressCode	Bill to address address code. Used for integration to the supplier's fulfillment system
Contact	Contact lines for the address
label (attribute)	"Label for a contact address line (e.g. ""Attn: """)"
linenumber (attribute)	Sequence line number for the contact address line
AddressLine	Address lines for the address
label (attribute)	"Label for the address line (e.g. ""Street Address""")"
linenumber (attribute)	Sequence line number for the address line
City	City for the address
State	State for the address
PostalCode	Postal zip code the address
Country	Country for the address
ShipTo	Ship to address for the requisition. Applies to all requisition lines unless a specific line has a unique ship to address
Address (same as BillTo)	See bill to address descriptions
AccountingDate	The fiscal order date.
Note	Note used to relay information for the internal review and approval process.
Attachments	File and URL attachments used for internal review and approval
Attachment	
AttachmentName	Descriptive name for the attachment
AttachmentURL	Network or internet location address for the attachment
AttachmentSize	File size of the attachment
Note (same as InternalInfo)	Note to send to the supplier for ordering information
Attachment (same as InternalInfo)	File and URL attachments to be sent to the supplier
Expediate	Indicator for the supplier that the order should be shipped as soon as possible
value (attribute)	true/false
ShippingMethod	Requested shipping method for the order
id (attribute)	Internal shipping method id
Carrier	Requested carrier for the order (e.g. UPS, FedEx, etc.)
id (attribute)	Internal carrier id
MethodName	Requested shipping method name for the order (e.g. Ground, Overnight, etc.)
RequestedDeliveryDate	The date the user requests the order be delivered
RequisitionSupplierGroup	Grouping of supplier information.
RequisitionSupplierGroupinfo	
Supplier	The supplier for the requested items
id (attribute)	Internal identifier for the supplier. The identifier is internal to the SciQuest application
Name	Supplier name
SupplierNumber	Customer supplier identifier
DUNS	DUNS number for the supplier
FulfillmentAddressInternalId	Internal identifier for the supplier's fulfillment center location. The identifier is internal to the SciQuest application
FulfillmentAddressId	Customer supplier's fulfillment center location identifier
FulfillmentAddressThirdPartyId	Additional customer supplier's fulfillment center location identifier
ContactInfo	
Phone	Supplier contact phone number
Fax	Suppliers fax number. Used for order distribution
Email	Suppliers email address. Used for order distribution
AccountCode	Customer's supplier account code
PricingCode	Customers supplier pricing code
ShippingCharges	Shipping charges for the order. Charges for the all items for the supplier
TSHConfig	
override (attribute = true/false)	Indicator that the shipping charges are different from defined as part of the supplier's profile within the SciQuest application
PercentageRate	Shipping charges percentage rate (e.g. 6%)
FlatChargeByLine	Flat shipping charge amount for each line

TABLE 1-continued

XML DATA STRUCTURE AND FIELDS ASSOCIATED WITH A PURCHASE REQUISITION.	
FlatChargeByOrder	Flat shipping charge amount for each order
FreeThresholdLimit	Threshold limit where shipping charges are not applied
	TSHActualCharge
Money	
currency (attribute)	Shipping charge amount
HandlingCharges	Handling charges for the order. Charges for the all items for the supplier
Tax1	Tax charges for the order. Charges for the all items for the supplier
Tax2	Additional tax charges for the order. Charges for the all items for the supplier
RequestedPONumber	PO number to be assigned to the purchase order to be sent to the supplier
RequisitionLine	Line item information for the order
linenumber (attribute)	Line number for the order
Item	Requested item
Catalog Number	Requested catalog (SKU) number
AuxiliaryCatalogNumber	Requested item auxiliary catalog number
Description	Item description
ProductUnitOfMeasure	Item's unit of measure
Measurement	
type	Defines the type of product measurement. From the customer, supplier or internal amount
(attribute = buyerlsupplierlsystem)	
MeasurementAmount	The item's unit of measurement amount
MeasurementUnit	The item's unit of measurement unit indicator
MeasurementValue	The item's combined amount and unit
ProductSize	Item's product size (e.g. 10 mL)
type	Defines the type of product size. From the customer supplier or internal amount
(attribute = buyerlsupplierlsystem)	
Measurement	same as ProductUnitOfMeasure
UNSPSC	Item's UNSPSC value
CommodityCode	Item's commodity code value
ProductReferenceNumber	Internal SciQuest product identifier
ProductType	Product type (hosted, non-catalog, punchout). Indicates the type of product and how it was added to the cart
ProductClassification	Flags for the item (e.g. Green, Radioactive, Rad Minor)
	type (attribute)true/false
Supplier	(same as RequisitionSupplierGroupinfo)
ManufacturerInfo	
Name	Item's manufacturer name
CatalogNumber	Item's manufacturer catalog (SKU) number
LeadTimeDays	Number of days required for item shipment
CASNumber	Item's CAS number
RadioNuclide	Item's RadioNuclide amount
BarCode	Item's barcode
Quantity	Requested quantity
CapitalExpense	Indicator that the item is a capital expense
FixedAsset	Indicator that the item is a fixed asset
Taxable	Indicator that the item should be considered taxable
LineCharges	
UnitPrice	Item's unit price
ShippingCharges	See the same element in the Supplier Group
TaxShippingHandling	See the same element in the Supplier Group
TSHConfig	See the same element in the Supplier Group
override (attribute = true/false)	See the same element in the Supplier Group
PercentageRate	See the same element in the Supplier Group
FlatChargeByLine	See the same element in the Supplier Group
FlatChargeByOrder	See the same element in the Supplier Group
FreeThresholdLimit	See the same element in the Supplier Group
TSHActualCharge	
Money	
currency (attribute)	See the same element in the Supplier Group
HandlingCharges	See the same element in the Supplier Group
TaxShippingHandling	(same as ShippingCharges)
Tax1	See the same element in the Supplier Group
Tax2	See the same element in the Supplier Group
DeliveryInfo	
Expediate	See the same element in the Supplier Group
value (attribute)	
ShippingMethod	See the same element in the Supplier Group
Carrier	See the same element in the Supplier Group
id (attribute)	
MethodName	See the same element in the Supplier Group
MethodDisplayText	See the same element in the Supplier Group
RequestedDeliveryDate	See the same element in the Supplier Group
SupplierInfo	See the same element in the Supplier Group
AccountingCode	See the same element in the Supplier Group

TABLE 1-continued

XML DATA STRUCTURE AND FIELDS ASSOCIATED WITH A PURCHASE REQUISITION.	
PricingCode	See the same element in the Supplier Group
Contract Number	Contract number associated with the requested item
Note	See the same element in the Supplier Group
Attachments	See the same element in the Supplier Group
Attachment	See the same element in the Supplier Group
AttachmentName	See the same element in the Supplier Group
AttachmentURL	See the same element in the Supplier Group
AttachmentSize	See the same element in the Supplier Group
QuoteNumber	Supplier quote number for the item
InternalInfo	See the same element in the Supplier Group
Note	See the same element in the Supplier Group
Attachments	See the same element in the Supplier Group
Attachment	See the same element in the Supplier Group
AttachmentName	See the same element in the Supplier Group
AttachmentURL	See the same element in the Supplier Group
AttachmentSize	See the same element in the Supplier Group
BillTo	See the same element in the Supplier Group
Address (same as BillTo)	See the same element in the Supplier Group
ShipTo	See the same element in the Supplier Group
Address (same as BillTo)	See the same element in the Supplier Group
END OF TABLE 1	

Each of the above identified elements may be stored in one or more of the previously mentioned memory devices, and corresponds to a set of instructions for performing a function described above. The above identified modules or programs (i.e., sets of instructions) need not be implemented as separate software programs, procedures or modules, and thus various subsets of these modules may be combined or otherwise re-arranged in various embodiments. In some embodiments, memory 2010 and 2110 may store a subset of the modules and data structures identified above. Furthermore, memory 2010 and 2110 may store additional modules and data structures not described above.

The foregoing description, for purpose of explanation, has been described with reference to specific embodiments. However, the illustrative discussions above are not intended to be exhaustive or to limit the invention to the precise forms disclosed. Many modifications and variations are possible in view of the above teachings. The embodiments were chosen and described in order to best explain the principles of the invention and its practical applications, to thereby enable others skilled in the art to best utilize the invention and various embodiments with various modifications as are suited to the particular use contemplated.

We claim:

1. A computer-implemented method, comprising:

by a server system, in response to one or more user commands to an electronic procurement system:

receiving a purchase requisition, where the purchase requisition originates from outside the electronic procurement system;

converting the purchase requisition from a first computer-readable format to a second computer-readable format, wherein the second computer-readable format is native to the electronic procurement system;

verifying that the purchase requisition that originates from outside the electronic procurement system includes one or more required fields, including at least a field used to verify that the purchase requisition originates from a recognized user of the electronic procurement system;

determining that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items;

in accordance with the determination that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items, requesting bids from a plurality of vendors;

receiving a plurality of bids from the plurality of vendors for the verified purchase requisition;

receiving a user selected bid;

updating the purchase requisition with the user selected bid; and

routing the purchase requisition including the user selected bid for approval.

2. The computer-implemented method of claim 1, further comprising prior to routing,

receiving at the electronic procurement system edits by a user to the purchase requisition, and updating the purchase requisition with the edits.

3. The computer-implemented method of claim 2, further comprising verifying that the updated purchase requisition includes the one or more required fields.

4. The computer-implemented method of claim 1, further comprising after receiving the purchase requisition

preventing a user associated with the purchase requisition from editing the purchase requisition; or

verifying that a purchaser required information is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or

verifying that at least one line item is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or

verifying that required information is present, and if not, saving the purchase requisition in the electronic procurement system and notifying a user associated with the purchase requisition that required information is missing, and

wherein the required information is specified by a purchasing organization associated with the purchase requisition or is a next approver associated with a user submitting the purchase requisition.

5. The computer-implemented method of claim 1, wherein converting the purchase requisition includes:

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importing an attachment associated with the purchase requisition into the electronic procurement system; or identifying a respective restricted item in the purchase requisition and applying a respective restriction to the purchase requisition; or identifying a form associated with the purchase requisition and mapping data from the purchase requisition into the form, and storing the mapped form data at the electronic procurement system; or identifying the purchase requisition as an imported requisition; or identifying and storing a requisition identifier associated with a user submitting the requisition, and wherein the electronic procurement system supports searching by the requisition identifier.

6. The computer-implemented method of claim 1, wherein the second computer-readable format native to the electronic procurement system is an Extensible Markup Language.

7. The computer-implemented method of claim 5, further comprising identifying in the purchase requisition a restriction override request for a respective restricted item.

8. The computer-implemented method of claim 1, wherein receiving a purchase requisition includes receiving a plurality of purchase requisitions in a single operation.

9. The computer-implemented method of claim 1, wherein routing the purchase requisition for approval includes: preventing a re-order based on the purchase requisition; or routing the purchase requisition to an approval process for imported requisitions.

10. A server system, comprising: one or more processors; memory; and one or more programs stored in the memory, the one or more programs comprising instructions to: by a server system, in response to one or more user commands to an electronic procurement system: receiving a purchase requisition, where the purchase requisition originates from outside the electronic procurement system; converting the purchase requisition from a first computer-readable format to a second computer-readable format, wherein the second computer-readable format is native to the electronic procurement system; verifying that the purchase requisition that originates from outside the electronic procurement system includes one or more required fields, including at least a field used to verify that the purchase requisition originates from a recognized user of the electronic procurement system; determining that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items; in accordance with the determination that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items, requesting bids from a plurality of vendors; receiving a plurality of bids from the plurality of vendors for the verified purchase requisition; receiving a user selected bid; updating the purchase requisition with the user selected bid; and routing the purchase requisition including the user selected bid for approval.

11. The server system of claim 10, further comprising instructions for prior to routing, receiving at the electronic procurement system edits by a user to the purchase requisition, and updating the purchase requisition with the edits.

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12. The server system of claim 11, further comprising instructions for verifying that the updated purchase requisition includes the one or more required fields.

13. The server system of claim 10, further comprising instructions for after receiving the purchase requisition, preventing a user associated with the purchase requisition from editing the purchase requisition; or verifying that a purchaser required information is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or verifying that at least one line item is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or verifying that required information is present, and if not, saving the purchase requisition in the electronic procurement system and notifying a user associated with the purchase requisition that required information is missing; and

wherein the required information is specified by a purchasing organization associated with the purchase requisition or is a next approver associated with a user submitting the purchase requisition.

14. The server system of claim 10, wherein instructions for converting the purchase requisition includes instructions for: importing an attachment associated with the purchase requisition into the electronic procurement system; or identifying a respective restricted item in the purchase requisition and applying a respective restriction to the purchase requisition; or identifying a form associated with the purchase requisition and mapping data from the purchase requisition into the form, and for storing the mapped form data at the electronic procurement system; or identifying the purchase requisition as an imported requisition; or identifying and storing a requisition identifier associated with a user submitting the requisition, and wherein the electronic procurement system supports searching by the requisition identifier.

15. The server system of claim 10, wherein the second computer-readable format native to the electronic procurement system is an Extensible Markup Language.

16. The server system of claim 14, further comprising instructions for identifying in the purchase requisition a restriction override request for a respective restricted item.

17. The server system of claim 10, wherein instructions for receiving a purchase requisition includes instructions for receiving a plurality of purchase requisitions in a single operation.

18. The server system of claim 10, wherein instructions for routing the purchase requisition for approval includes instructions for:

preventing a re-order based on the purchase requisition; or routing the purchase requisition to an approval process for imported requisitions.

19. A non-transitory computer-readable storage medium storing one or more programs configured for execution by a computer, the one or more programs comprising instructions to:

by a server system, in response to one or more user commands to an electronic procurement system: receiving a purchase requisition, where the purchase requisition originates from outside the electronic procurement system;



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converting the purchase requisition from a first computer-readable format to a second computer-readable format, wherein the second computer-readable format is native to the electronic procurement system;

verifying that the purchase requisition that originates from outside the electronic procurement system includes one or more required fields, including at least a field used to verify that the purchase requisition originates from a recognized user of the electronic procurement system; determining that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items;

in accordance with the determination that the verified purchase requisition includes an item that is in short-supply or includes a large volume of items, requesting bids from a plurality of vendors;

receiving a plurality of bids from the plurality of vendors for the verified purchase requisition;

receiving a user selected bid;

updating the purchase requisition with the user selected bid; and

routing the purchase requisition including the user selected bid for approval.

**20.** The non-transitory computer-readable storage medium of claim **19**, further comprising instructions for prior to routing,

receiving at the electronic procurement system edits by a user to the purchase requisition, and updating the purchase requisition with the edits.

**21.** The non-transitory computer-readable storage medium of claim **20**, further comprising instructions for verifying that the updated purchase requisition includes the one or more required fields.

**22.** The non-transitory computer-readable storage medium of claim **19**, further comprising instructions for after receiving the purchase requisition,

preventing a user associated with the purchase requisition from editing the purchase requisition; or

verifying that a purchaser required information is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or

verifying that at least one line item is associated with the purchase requisition, and if not, notifying a sender of the purchase requisition that the purchase requisition is refused; or

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verifying that required information is present, and if not, saving the purchase requisition in the electronic procurement system and notifying a user associated with the purchase requisition that required information is missing, and

wherein the required information is specified by a purchasing organization associated with the purchase requisition or is a next approver associated with a user submitting the purchase requisition.

**23.** The non-transitory computer-readable storage medium of claim **19**, wherein instructions for converting the purchase requisition includes instructions for:

importing an attachment associated with the purchase requisition into the electronic procurement system; or

identifying a respective restricted item in the purchase requisition and applying a respective restriction to the purchase requisition; or

identifying a form associated with the purchase requisition and mapping data from the purchase requisition into the form, and for storing the mapped form data at the electronic procurement system; or

identifying the purchase requisition as an imported requisition; or

identifying and storing a requisition identifier associated with a user submitting the requisition, wherein the electronic procurement system supports searching by the requisition identifier.

**24.** The non-transitory computer-readable storage medium of claim **19**, wherein the second computer-readable format native to the electronic procurement system is an Extensible Markup Language.

**25.** The non-transitory computer-readable storage medium of claim **19**, further comprising instructions for identifying in the purchase requisition a restriction override request for a respective restricted item.

**26.** The non-transitory computer-readable storage medium of claim **19**, wherein instructions for receiving a purchase requisition includes instructions for receiving a plurality of purchase requisitions in a single operation.

**27.** The non-transitory computer-readable storage medium of claim **19**, wherein instructions for routing the purchase requisition for approval includes instructions for:

preventing a re-order based on the purchase requisition; or routing the purchase requisition to an approval process for imported requisitions.

\* \* \* \* \*

UNITED STATES PATENT AND TRADEMARK OFFICE  
**CERTIFICATE OF CORRECTION**

PATENT NO. : 9,245,291 B1  
APPLICATION NO. : 12/286507  
DATED : January 26, 2016  
INVENTOR(S) : Ballaro et al.

Page 1 of 1

It is certified that error appears in the above-identified patent and that said Letters Patent is hereby corrected as shown below:

Title Page, Item (57) Abstract, line 10, please delete "requisition verified" and insert  
--requisition is verified--;

In the claims,

Claim 14, column 88, line 26, please delete "includes" and insert --include--;

Claim 17, column 88, line 49, please delete "includes" and insert --include--;

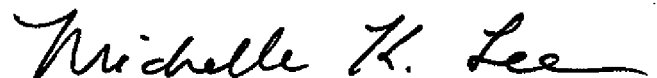
Claim 18, column 88, line 53, please delete "includes" and insert --include--;

Claim 23, column 90, line 12, please delete "includes" and insert --include--;

Claim 26, column 90, line 38, please delete "includes" and insert --include--;

Claim 27, column 90, line 42, please delete "includes" and insert --include--.

Signed and Sealed this  
Twenty-sixth Day of April, 2016



Michelle K. Lee  
*Director of the United States Patent and Trademark Office*